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ABSTRACT

Packaging is the process of finding the best combination of aid to meet a student's financial need for college, given limited resources and the institutional constraints that vary from school to school. This guide to packaging under the EDExpress software system outlines three steps to packaging. The first is determining the student's need for financial aid (cost of attendance less expected family contribution). The second is calculating and awarding the Federal Pell Grant, and the third is awarding aid from federal, state, private, and school sources to best meet the student's remaining need. For step three, each school has the latitude to use its own policies and procedures for allocation. EDExpress Packaging is the module that contains the basic functions for tracking and awarding a student's Title IV Federal Aid, state aid, school aid, and other outside resources. Following an overview of EDExpress Packaging, this guide presents information on: (1) "System Setups"; (2) "Managing Data"; (3) "Document Tracking"; (4) "Working with Student Awards"; and (5) "Reports." Five appendixes contain sample worksheets and letters, a glossary, sample reports, and sample query reports. (SLD)

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2001-2002 EDExpress Packaging Training

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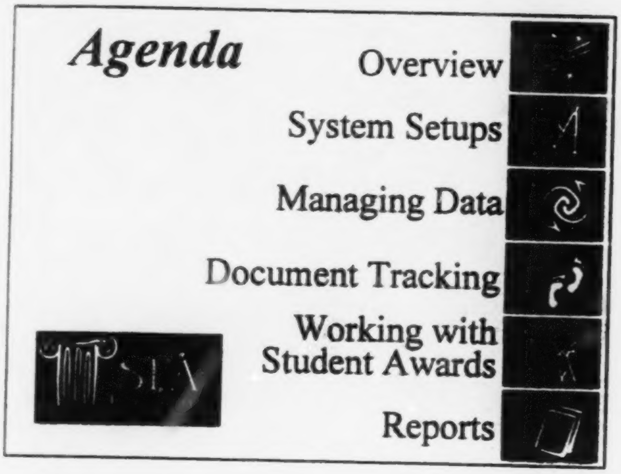
Welcome

2001-2002 EDExpress Packaging Training



Agenda

Overview

System Setups

Managing Data

Document Tracking

Working with Student Awards

Reports

Agenda

Session 1: Overview

In this session, we provide an introduction to the Packaging module of EDExpress and learn how to create queries, a powerful feature of EDExpress that you will find very useful when working with student records.

Session 2: System Setups

You must set up your Packaging system properly before you can work with student records. In this session, we will enter the parameters that will be used to package records, such as your academic year profile, budgets, packaging methodology, and funds.

Session 3: Managing Data

After setting up your system, you need to enter records into the Packaging module. In this session, we will show you how to import records from your ISIR database; import records from your school's system; and manually enter records. We'll also show you how to work with your packaging records.

Session 4: Document Tracking

Keeping track of required documentation is an important part of the packaging process. In this session, we learn how to manage the request for and receipt of documents required for financial aid processing.

Session 5: Working with Student Awards

Once you create student packaging records in the Packaging database, you are ready to award or package financial aid for your eligible students. In this session, we learn how to package awards, revise awards, and create award letters.

Session 6 Reports

In this final session, we learn about the reporting features available in EDExpress.

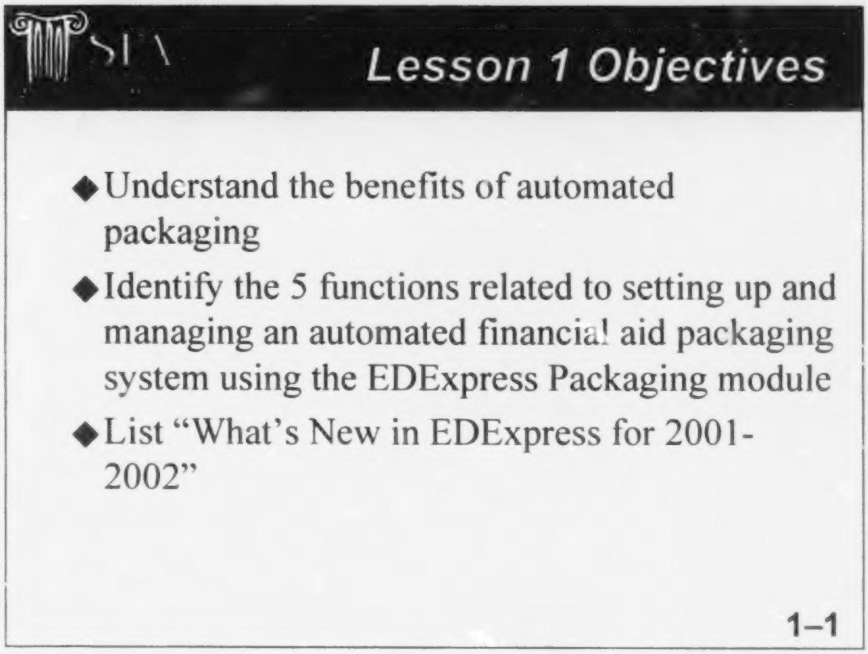
Session 1: Overview

Lesson 1: Introduction to Packaging

Lesson 2: Query

Session 1: Overview

Lesson 1: Introduction to Packaging



Lesson 1 Objectives

- Understand the benefits of automated packaging
- Identify the 5 functions related to setting up and managing an automated financial aid packaging system using the EDExpress Packaging module
- List "What's New in EDExpress for 2001-2002"

Key Terms

Packaging:

The process of finding the best combination of aid to meet a student's financial need, given limited resources and given institutional constraints that vary from school to school.

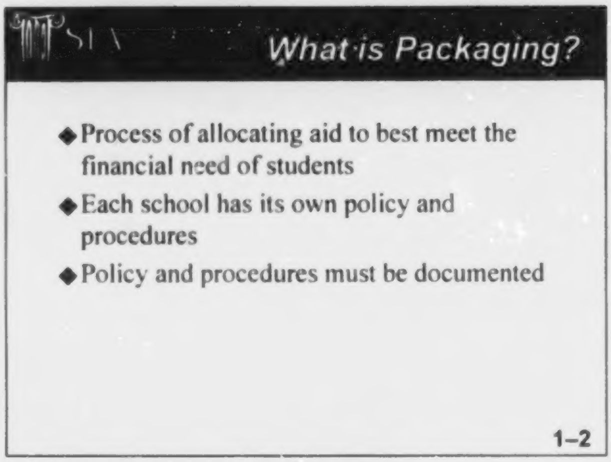
Packaging Philosophy:

The logic and reasoning a school uses in determining how to award students financial aid.

Packaging Status:

Indicates the current status of the record and displays one of the following codes:

- U=Unpackaged
- R=Ready to package
- N=Not Ready to package
- P=Packaged
- S=Suspend
- H=Hand packaged
- M= Manually adjusted package



What is Packaging?

- ◆Process of allocating aid to best meet the financial need of students
- ◆Each school has its own policy and procedures
- ◆Policy and procedures must be documented

1–2

What is Packaging?

Packaging is the process of finding the best combination of aid to meet a student's financial need, given limited resources and given institutional constraints that vary from school to school.

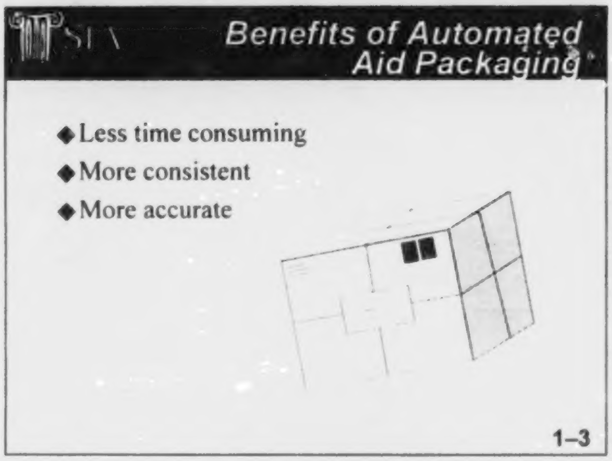
Packaging involves three steps:

1. Determining the student's need for financial aid, which is the student's cost of attendance less Expected Family Contribution (EFC);
2. Calculating and awarding the Federal Pell Grant; and
3. Awarding other aid from federal, state, private, and school sources to best meet the student's remaining need.

For step three, each school has the latitude to come up with its own policy and procedures for how to allocate scarce funds from different sources to meet their students' needs. The policy and procedures, however, must be documented and applied consistently. The school's policy for awarding aid is often called its "packaging philosophy."

Each school may consider questions such as these when determining its packaging philosophy:

- Should priority be given to students who apply first (on a "first-come-first served" basis)?
- Should grant assistance be awarded to beginning students and should loans and work-study go to students who have had a chance to adapt to the academic program?
- If there are not enough funds to meet every student's need, should the school give more assistance to the neediest students?
- Or should the school's policy be to meet an equal portion of each student's need across the board?



Benefits of Automated Aid Packaging

- ◆ Less time consuming
- ◆ More consistent
- ◆ More accurate

1–3

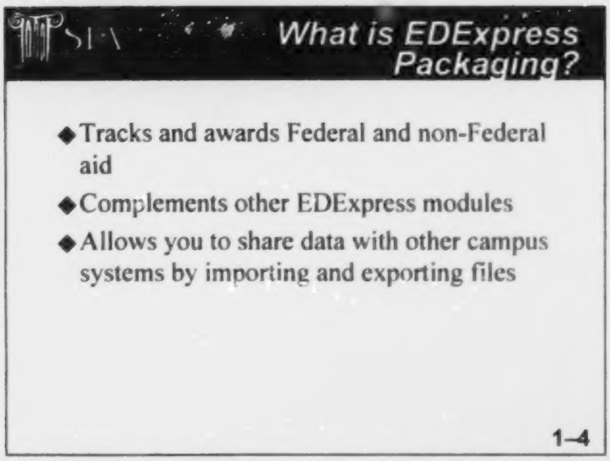
Benefits of Automated Financial Aid Packaging

Packaging allocates aid to students based on numerous factors, including the student's cost of attendance (or budget); Expected Family Contribution; enrollment status; availability of federal, state, school, and outside resources; federal and state requirements governing the annual and aggregate award amount; and the school's philosophy for how scarce funds should best be distributed.

In spite of its complexity, financial aid packaging is often done manually, one student at a time.

Using a software product, such as EDExpress, has several advantages over the manual approach:

- Less time consuming: EDExpress automatically applies your school's methodology to student records and performs the required need calculations in a fraction of the time it takes to perform them manually.
- More consistent: EDExpress applies your school's packaging methodology consistently to all student records, without regard to the personal preference of individual staff members.
- More accurate: EDExpress will not make arithmetic errors when determining a student's need and calculating a Pell Grant.



What is EDExpress Packaging?

- Tracks and awards Federal and non-Federal aid
- Complements other EDExpress modules
- Allows you to share data with other campus systems by importing and exporting files

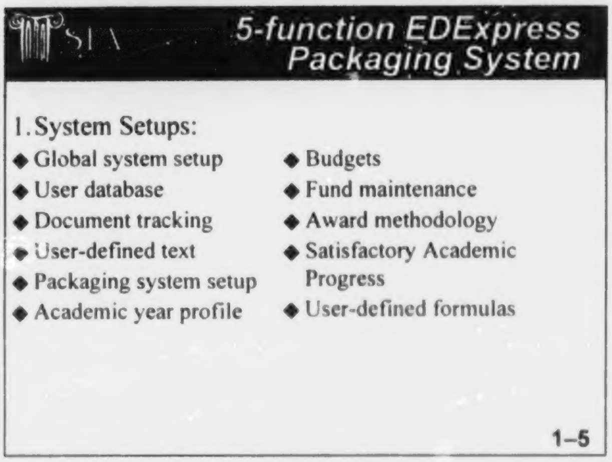
1–4

What is EDExpress Packaging?

Packaging is the EDExpress module that contains all of the basic functions for tracking and awarding a student's Title IV Federal aid, state aid, school aid, and other outside resources. In addition to creating individual award records, you can also use Packaging to perform many other functions, such as maintaining funds and creating a Fiscal Operations Report and Application to Participate (FISAP) income grid.

Packaging complements the other modules of EDExpress. For example, since many of the data elements necessary to determine an award are present in the ISIR, you can import the ISIR into Packaging to create an award package for a student. Then, you can import the student's awarded loans into the Direct Loan module of EDExpress to create Direct Loan origination records or import the Pell Grant award into the Pell module to create Pell origination records.

The EDExpress Packaging module also allows you to import from and export to your school's financial aid system.



5-function EDExpress Packaging System

1. System Setups:

- Global system setup
- User database
- Document tracking
- User-defined text
- Packaging system setup
- Academic year profile
- Budgets
- Fund maintenance
- Award methodology
- Satisfactory Academic Progress
- User-defined formulas

1–5

5-Function EDExpress Packaging System

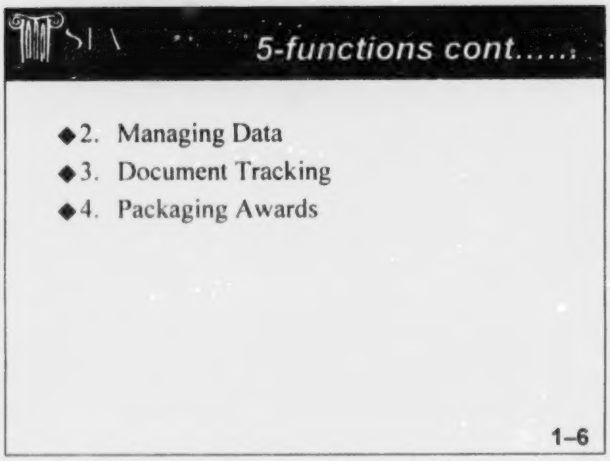
EDExpress' Packaging module is intended to be integrated with the App Express, Direct Loan and Pell modules, but it can also be used as a stand-alone product. In addition, you can use data imported from an external school source to create award packages and Direct loan origination records.

The Packaging module can be defined by five relatively seamless functions that allow schools to track documentation, create award packages, maintain established fund balances, create award and document tracking letters, and generate system-defined reports.

1. System Setups

Defines the components and parameters of both your institution and its award methodology:

- Global system setup
- User database
- Document tracking
- User-defined text
- Packaging system setup
- Academic year profile
- Budgets
- Fund maintenance
- Award methodology
- Satisfactory Academic Progress
- User-defined formulas



5-functions cont.....

- ◆2. Managing Data
- ◆3. Document Tracking
- ◆4. Packaging Awards

1–6

2. Managing Data

Creates packaging records using three methods:

- Manual entry
- ISIR imports
- External data imports

3. Document Tracking

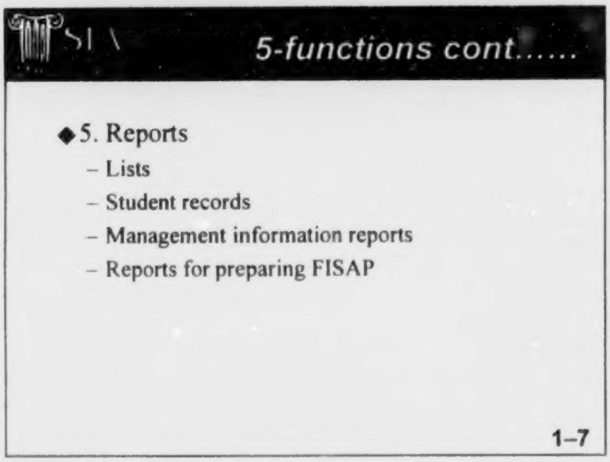
Tracks documents and generates tracking letters. Adds documents to student records using three options:

- Manual entry from an open student record;
- Add Documents process to automatically assign documents to multiple student records according to pre-established criteria; and
- Multiple Entry process to automatically assign documents or update the status of a document for multiple student records.

4. Packaging Awards

Packages, repackages, or unpackages financial aid awards for an individual student or a group of students using one of two methods:

- Manual packaging
- Automatic packaging



5-functions cont......

- 5. Reports
  - Lists
  - Student records
  - Management information reports
  - Reports for preparing FISAP

1–7

5. Reports

Provides several system-defined reports to assist with financial aid management.

- **Funds Maintenance** -This option provides you with instant information about total amounts awarded for each fund entered under Tools/Setup/Packaging/Fund Maintenance.
- **Packaged Students by Fund Code -** This option allows you to print a list of packaged students by the fund entered in fund code order.
- **Packaged Students -** This option prints all students with a packaging status equal to P, H, or M with subtotals and totals. You can sort the list by last name, SSN, EFC, last name, or priority date.
- **Unpackaged Students -** This option prints all students whose packaging status is not equal to P, H, or M. This list provides two sort options: SSN and last name.
- **Entered Packaging Records -** This option prints all students in the packaging database without regard to their packaging status.
- **Packaging Setup -** This option prints your entire packaging setup profiles.
- **Packaging Record** -This option prints a group of packaging records at the batch level or a single record when an individual SSN is entered (or a student record is open). The packaging record can be reprinted at any time.
- **Measurement Tools -** The user has the ability to print the Measurement Tools - Funds report.
- **FISAP-Eligible Dependent Students** -This option allows you to print a detail page that displays the distribution of all dependent eligible aid applicants in the Packaging database by income. This report is useful when preparing Section E of the FISAP.
- **FISAP-Eligible Independent Students** -This option allows you to print a detail page that displays the distribution of all independent eligible aid applicants in the Packaging database by income. This report is useful when preparing Section E of the FISAP.

What's New In Packaging for 2001-2002?

New!

General

Setup

Process

Entry

Import

Print

Browse

1–8

What's New in Packaging for 2001-2002?

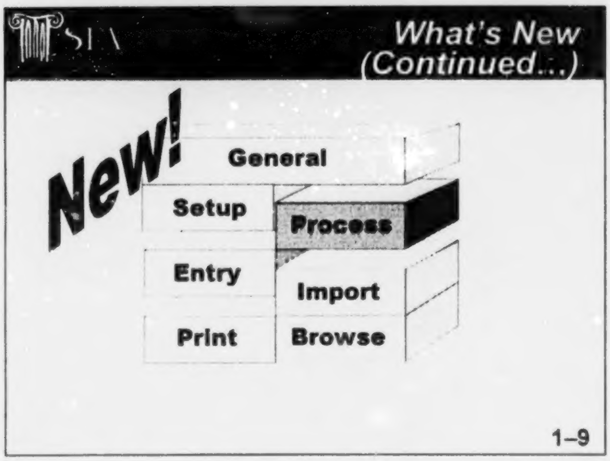
A number of new features were added to Version 7.0 of EDExpress, the version that includes the Packaging module for the 2001-2002 award year.

General

- Two new Global imports are available: Prior Year User-Defined Queries and Setup allows you to use queries you created for the previous version of EDExpress, as well as the settings you defined for Setup. Prior Year Demographic Data imports student demographic data from your 2000-2001 EDExpress database.
- New income grids and field labels match those in Part II of the FISAP 3.0 software.

Setup

- A new aid type R is designated for Non-need Based Grants.
- Budget setup has a new field for Loan Fees.
- Unsubsidized loans (from both the Direct Loan and FFEL programs) can be set up as either need based (aid type D) or non-need based (aid type U).
- The new aid type V is designated for Chapter 30 VA Benefits and AmeriCorps.
- The Remaining Need range grid can now be used on all loan funds.
- A new option, Do not remove if unpackaged? is now part of the Fund Maintenance setup. This option allows you to keep a particular fund from being removed during the unpackage process.
- The term Housing Status is now Housing Plans.



What's New (Continued...)

New!

General

Setup

Process

Entry

Import

Print

Browse

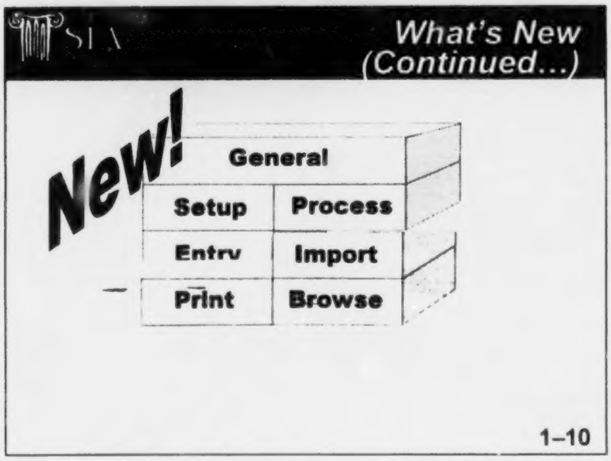
1–9

Process

- PLUS loans are packaged only if a student is dependent.
- The Packaging process can be run at the record level when the Packaging status is N.
- A dialog box displays the reason a record cannot be packaged if the Packaging process is attempted at the record level (for example, a required document is missing).
- User-Defined formulas calculate all awards of a particular fund when awarded multiple times.
- Chapter 30 VA Benefits/AmeriCorps are excluded as a resource when calculating eligibility for Federal subsidized loans.
- The new document status, Received Not Reviewed, prevents a record from being packaged if a required document has been received but not reviewed.
- Award Letter Received, Received Date, and Print Letter in Next Batch fields are updated only when the Packaging status is P, H, or M.

Entry

- Aggregate loan fields have been added to the Awards tab and NSLDS information is pulled from the ISIR upon import. These are modifiable fields.
- The grade level values have changed: 0 = 1st year undergraduate/never attended college, 1 = 1st year undergraduate/attended college before, and 2 = 2nd year undergraduate/sophomore, etc.
- The Budget Code field on the Awards tab now allows budget codes containing spaces.
- The Priority Date field has been replaced with Priority Date Range on the Package Student, Unpackage Student, and Repackage Student dialog boxes.



What's New (Continued...)

New!

General

Setup | Process

Entry | Import

Print | Browse

1–10

Import

- Two progress bars display when importing ISIRs and adding budgets at the same time, one to display the progress of the ISIR import and the other to display the progress of the Add Budgets import.

Print

- The Packaging Record report prints from the Awards tab with or without assigned fund codes.
- The Federal School Code is not added to the award letter if the option to exclude the school name/address fields on the award letter is chosen.
- List-Students by Fund Code report has three new reporting options: Packaged, Not Packaged, Both.
- Need Based Loans is now Other Need Based Loans on the Funds Measurement Report.
- Two additional rows appear on the Offer and Notification Award Letters. The first row defaults the phrase "Dear Student," and the second row is blank. Both rows are modifiable.
- The Sort Order options for Last Name and SSN are enabled for the List-Students by Fund Code report.

Browse

- The new browse table, Student Award Term, can be used to export and print disbursement rosters.

Lesson 1 Exercise

Instructions:

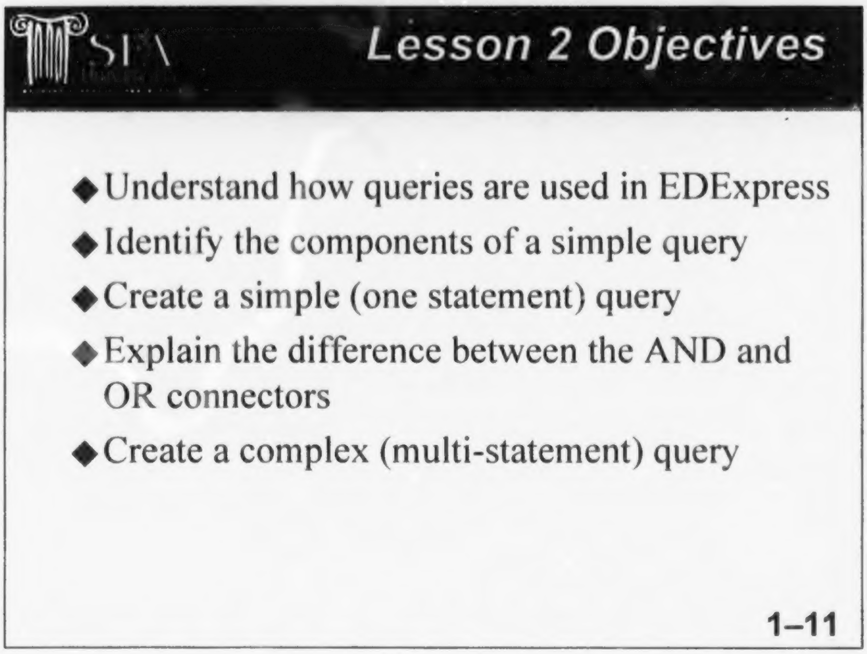
1. How would you describe the process of financial aid packaging to a student, or to someone new to financial aid?

2. List 2 benefits of using an automated system versus a manual one.

3. Name the new feature in 2001-2002 that will be most important to your school and why?

Session 1—Overview

Lesson 2: Query



Lesson 2 Objectives

- Understand how queries are used in EDExpress
- Identify the components of a simple query
- Create a simple (one statement) query
- Explain the difference between the AND and OR connectors
- Create a complex (multi-statement) query

Key Terms

And

Used to connect two segments of a query. Both segments must be true for a record to be selected.

Like

An operator that is used in a query to find values in a field that match a specified pattern, or "character string."

Operator:

A component of a query statement. Describes the relationship between a data field and its specified value. Operators used in EDExpress are equal to (=), greater than (>), greater than or equal to (>=), less than (<), less than or equal to (<=), not equal to (<>), Like, and Not Like.

Or

Used to connect two segments of a query. Only one of the segments must be true for a record to be selected.

Parentheses

Sets apart two or more statements within a complex query and defines the order in which the data fields are processed.

Query

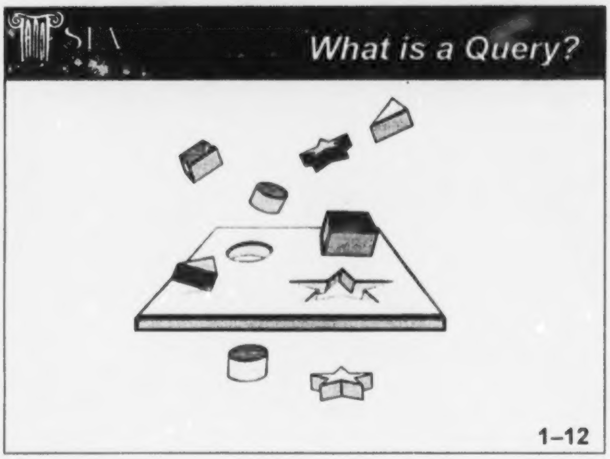
A request to retrieve data from EDExpress using criteria that you specify.

Parameter Query

A type of query that has fixed fields but not fixed values. When you create a parameter query, you specify the field name and operator for the query. Instead of specifying a value, you'll use the Prompt at Execution option. This option tells EDExpress to prompt you for the field values at the time you use the query.

User-defined Fields

Special fields that you create for your own use. User-defined fields can be used in all modules for building queries.



What is a Query?

1–12

What Is a Query?

A query is a request for certain records from your EDExpress database. A query describes records meeting certain criteria that you specify.

Think of a query as a lid on a box with geometric-shaped holes. Only objects that have the correct shape can be placed in the box; others do not fit. In this case the query (the lid) has been defined to select circles and stars, and to exclude all other objects.

Why Create a Query?

Understanding how to create and use queries is central to making effective use of the Packaging module.

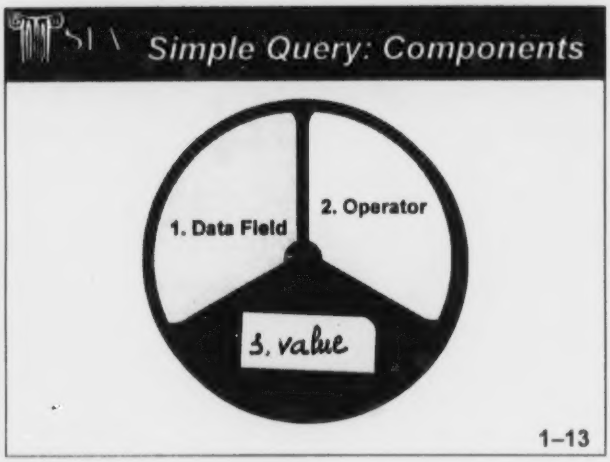
Use a query any time you want to work with a subset of all the records on your database. For instance, when using the Packaging module, you might need to assign a certain budget to only dependent students who live on campus.

Queries are used in all modules of EDExpress to perform specific functions, such as printing and exporting. Generally, any time working with a subset of records makes sense, EDExpress provides the option to use a query. Queries are available in any dialog box where you see the "Selection Criteria" button.

When using the Packaging module, you will have a need for queries in three modules of EDExpress: Global, App Express, and Packaging. A list of all of the functions that make use of queries within the EDExpress Global, App Express, and Packaging modules is displayed on the following page.

Functions Using Queries, by EDExpress Module

Global	App Express	Packaging
1. Print Document Tracking Letters	1. Print FAFSAs	1. Print Letters-Award
2. Print File Folder Labels	2. Print ISIRs	2. Print List - Students by Fund Code
3. Print List - Document Tracking by Document Code	3. Print List-Entered Application Records	3. Print List-Packaged Students
4. Print List - Document Tracking by Student	4. Print List-Entered Correction Records	4. Print List-Unpackaged Students
5. Print Mailing Labels	5. Print List-Entered Duplicate Records	5. Print List-Entered Packaging Records
6. Print User Data	6. Print List-Processed ISIRs	6. Print List-Packaging Record
7. Print User-Defined Letters 1-5	7. Print List-Renewal Application Data	7. Print Measurement Tools-Funds
8. Multiple Entry	8. Print NSLDS	8. Import Packaging Data-ISIR Data
	9. Export Applications-Initial	9. Export Packaging Data
	10. Export Applications-Renewal	10. Multiple Entry
	11. Export Initial & Renewal	11. Package
	12. Export Corrections	12. Unpackage
	13. Export External ISIR	13. Repackage
		14. Add Budgets
		15. Assign Fund
		16. Assign Award Methodology
		17. Assign Budgets



Simple Query: Components

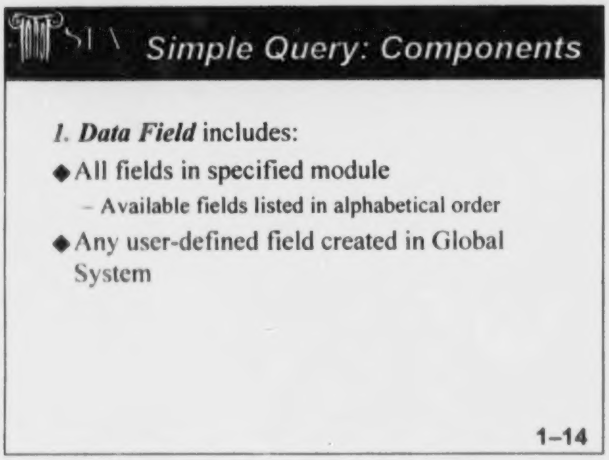
Components of a Simple Query Statement

A query statement has three components:

1. Data field
2. Operator
3. Value

The following are simple query statements:

Data Field	Operator	Value
(PACKAGING STATUS	=	"P")
(UNMET NEED AMOUNT	<=	10000)
(COMMENTS CODES	LIKE	"*053*")
(ADD DATE - ISIR	=	"20010215")
(REJECT REASON CODES	=	NULL)



Simple Query: Components

*1. **Data Field*** includes:

- All fields in specified module
  - Available fields listed in alphabetical order
- Any user-defined field created in Global System

1–14

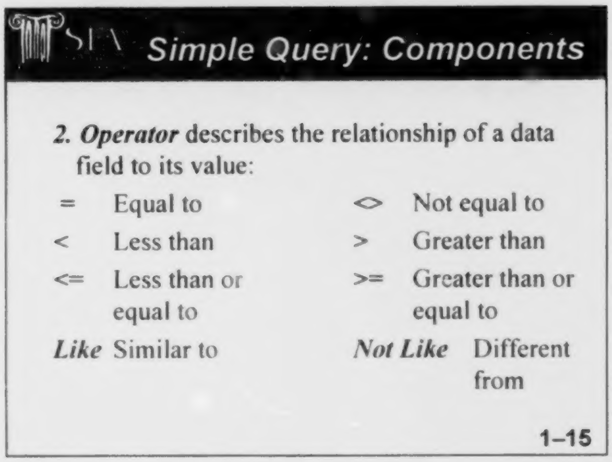
Data Field

More than 750 data fields in EDExpress can be used to build a query.

However, keep in mind that not all data fields will be available for all queries. Each module of EDExpress (Global, App Express, Packaging, Direct Loan, and Pell) contains a different set of data fields and performs a different set of functions. You can't mix and match functions you want to perform in one module with queries that select data from fields in another module. For example, you can't print a list of ISIRs (an App Express function) for students who have been packaged (a Packaging module data field). So, in designing your queries, keep in mind the functions and data fields available. A list of the fields used in the App Express, Global, and Packaging modules can be found in Appendix E.

When you build your query, the fields that are available will be presented in alphabetical order in a drop down list.

User-defined fields can also be used in a query. These are special fields that you create for your own school's use. Unlike standard EDExpress fields that are module-specific, user-defined fields are available in **all** modules for building queries.



Simple Query: Components

2. ***Operator*** describes the relationship of a data field to its value:

=	Equal to	<>	Not equal to
<	Less than	>	Greater than
<=	Less than or equal to	>=	Greater than or equal to
Like	Similar to	*Not Like*	Different from

1–15

Operator

Use an operator to describe the relationship of the data field to a specified value. Valid operators include:

= (equal to); > (greater than); >= (greater than or equal to); < (less than); <= (less than or equal to); <> (not equal to); Like; and Not Like.

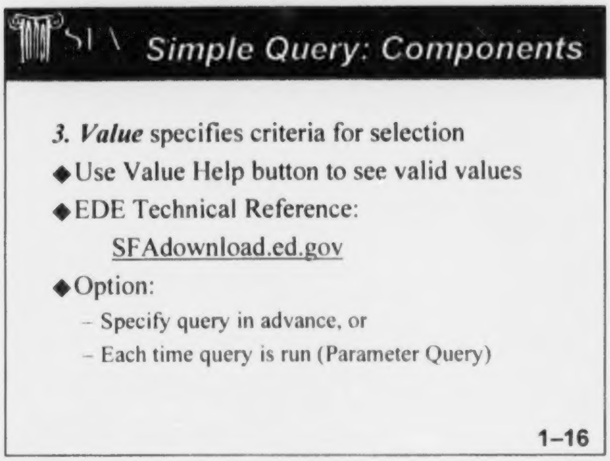
Use the Like operator to find values in a field that match the pattern you specify. For example:

(LOCAL ADDRESS LIKE "*PINE*")	Records with street addresses that include the characters "PINE"
(COMMENT CODES LIKE "*004*")	Records with comment code 004
(REJECT REASON CODES LIKE "*14*")	Records with reject code 14
(LAST NAME LIKE "*GE*")	Records with last names that include the characters GE

Note that whenever you use Comment Codes or Reject Reason Codes in a query, you need to use the Like and Not Like operators.

Also, be careful when using the <> (not equal to) operator because it will not recognize NULL values (blanks). For example, the field "Interested in Student Loans?" has three valid values: 1 (Yes), 2 (No), and blank. The following query would only count records with a 2 (No) value; records with a missing value in this field would not be considered:

(INTERESTED IN STUDENT LOANS? <> "1")



Simple Query: Components

3. ***Value*** specifies criteria for selection

◆Use Value Help button to see valid values

◆EDE Technical Reference:
SFAdownload.ed.gov

◆Option:
- Specify query in advance, or
- Each time query is run (Parameter Query)

1–16

Value

Specifying the value is the third step in building a query.

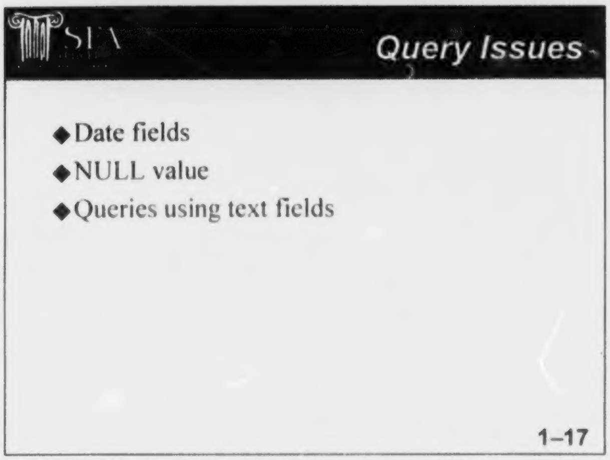
The value must be valid. Use the Value Help button to obtain the range of valid values for the data field. For certain fields, the Value Help button will direct you to the *Electronic Data Exchange (EDE) Technical Reference* for a list of the valid values. You can download the 2001-2002 EDE Technical Reference in Adobe PDF and MS Word format from:

SFAdownload.ed.gov

You have two options when specifying a value for your query:

- You can provide a value at the time you create the query. This value will be a constant; it will automatically be used each time the query is used.
- You can choose a value each time you run a query. Leave the value field blank at the time you create the query and mark the "Prompt at Execution" box. This type of query is often known as a parameter query. Parameter queries are convenient if you query on the same fields regularly but want to use different values. For example, if you routinely print a list of loan records and you want it to include records within a different SSN range each time you print the list, you can set up a query using the SSN field, an operator, and the Prompt at Execution option. Then, whenever you use the query, EDExpress prompts you to enter the range of SSNs you want to use at that time.

Note, however, that there are certain functions where parameter queries are not an option. For example, you cannot use parameter queries in Packaging setups.



Query Issues

- ◆Date fields
- ◆NULL value
- ◆Queries using text fields

1–17

Date Fields

Enter the value for date fields in CCYYMMDD format. For example, 20010215 is February 15, 2001. A special "Current Date" option is provided for date fields. Mark this checkbox to use the current date. Remember, EDExpress uses your PC's system date for this value, so if your system date is not the current date, this value won't be the current date.

Null Values

You may want to create a query that identifies a missing value in the specified field. For example, you might want to select records that have a missing enrollment status. If you need to identify missing values, leave the Value field blank. When you click the Append button to create your query, and the value you chose is a character value, "NULL" displays; if the value you chose is numeric, 2000000002 displays.

Queries Using Text Fields

When querying for a list of records using a text field, such as Last Name, you must be careful with the values you use. Use the operators > (greater than) and < (less than) and be sure that all the records you want to retrieve are included in the range.

For example, to retrieve a list of records A to L, you must use the query statement LAST NAME < M to be sure that all L records are included. If you use any other statement, you won't retrieve all records from A to L. Here are two more examples:

To retrieve a list of records by last name from:	Use this query statement:
A to F	(LAST NAME < "G")
P to Z	(LAST NAME > "O")

Building a Simple Query: Instructor Demonstration

In this demonstration, we build a simple query to select all records that have been awarded a Pell Grant of $3,000 or more.

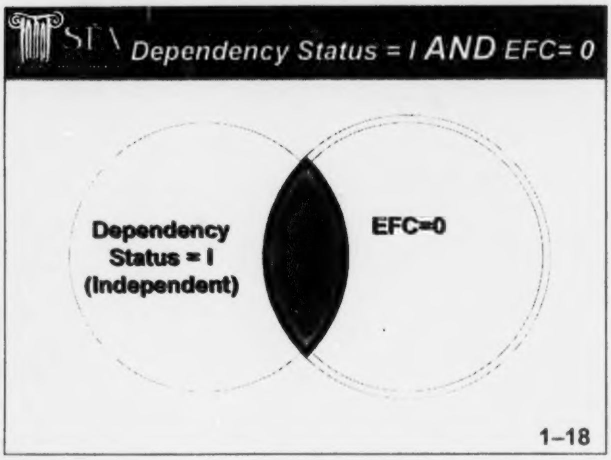
Step	Action
1	From the Windows desktop, click **Start**.
2	Select **Programs/EDESuite/EDExpress for Windows 2001-2002.**
3	Type **PACK** as your User ID; then type **PACK** as your Password.
4	Select **Tools/Query** from the menu bar. The Query Dialog box displays.
5	Click the **Packaging** tab.
6	Select **Add** to build a new query. A blank record displays.
7	Enter the **Title**—something descriptive that readily identifies the query. In this case, enter **Pell Grant Awards of 3000 or More**.
8	Click the **Field** down arrow to see the list of available fields in Packaging. With the cursor, select the desired field. In this case, select **Amount of Pell.**
9	Select the appropriate **Operator** by clicking the **down arrow** to see the full list. In this case, select >=.
10	Enter the **Value** to be measured against the field you selected. In this case, enter **3000**. (If you want to make this a Parameter Query, you would leave the Value field blank and mark the Prompt at Execution box.)
11	Click the **Append** button to add the statement to the query. The following query statement displays: (AMOUNT OF PELL >= 3000)
12	Click **Save**, to save the query. A Record Updates Saved dialog box displays.
13	Click **OK**.
14	Click **OK** again to return to the EDExpress main screen.

Building a Simple Query: Instructor Demonstration (continued)

You have created a query that will select all records from your packaging database that were awarded a Pell Grant of $3,000 or more.

Next, test your query by printing a list of packaged records.

Step	Action
15	Select **File/Print** from the menu bar.
16	Click the **Packaging** tab.
17	Click the **down arrow** in the Report text box and choose the type of list you want to print. In this case, select **List-Packaged Students**.
18	Click **Screen** for the output destination.
19	Click **Selection Criteria.**
20	Click the **ellipsis button.** (The button on the right side of the dialog box with three dots: …) A list of available query displays.
21	Click on the title of the query. In this case, click **Pell Grant Awards of 3000 or More**.
22	Click **OK**.
23	Click **OK** again to close the Selection Criteria dialog box.
24	Click **OK** to send the list to the screen. A list of student records that have been packaged and were awarded a Pell Grant of $3,000 or more displays. In this case, only one record met the conditions of the query.
25	Click **Zoom In** to magnify the list.
26	Click **Close** to exit.



SFA Dependency Status = I AND EFC= 0

Dependency Status = I (Independent)

EFC=0

What Is a Complex Query?

A complex query is formed by linking two or more simple queries together using an AND or an OR connector. Complex queries provide you with a powerful tool for working with your EDExpress database.

AND

Both segments of the query connected by AND must be true for a record to be selected.

Think of two overlapping circles, each circle representing the records selected by a query statement. When an AND connector is used, the query selects only those records that represent the overlap of the two circles. For example, the following query would only select independent records that have an EFC of 0:

(DEPENDENCY STATUS = "I") AND (EFC = 0)

Independents without an EFC equal to 0 and dependents with an EFC equal to zero would not be included in the query.

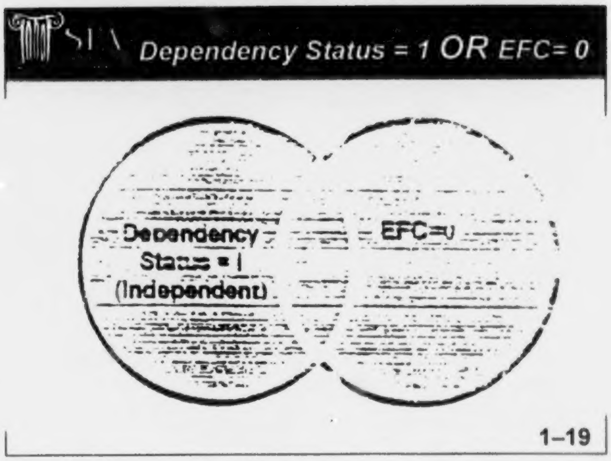
Other examples of queries using the AND connector follow:

- (ENROLLMENT PLAN SUMMER 2002 <> NULL) AND (ENROLLMENT PLAN SUMMER 2002 <> "5")

  Identifies records for students who indicated that they will be enrolled during the summer of 2002.

- (COMMENT CODES LIKE "*148*") AND (PARENT'S MARITAL STATUS = "1") AND (PARENT'S NUMBER OF FAMILY MEMBERS = "3")

  Identifies student records that all meet three conditions: an assumption was made about the number of family members attending college (Comment Code 147), the parents are married ("1"), and three people are in the household.



Dependency Status = 1 OR EFC= 0

OR

Only one of the segments connected by OR must be true for a record to be selected.

Think again of two overlapping circles, each circle representing the records selected by a query statement. When an OR connector is used, the query selects all of the records represented by the two circles, not just records represented by the overlap of the circles. For example, the following query would select all independent records and all records where the EFC equals zero:

(DEPENDENCY STATUS = "I") OR (EFC = 0)

Other examples of queries that use the OR connector follow:

- (DOCUMENT STATUS = "P") OR (DOCUMENT STATUS = "V")

  Identifies all records where documents are still needed for packaging ("P"), as well as all records where documents are still needed for verification ("V").

- (STUDENT'S STATE OF LEGAL RESIDENCE = "NY") OR (STUDENT'S STATE OF LEGAL RESIDENCE = "NJ") OR (STUDENT'S STATE OF LEGAL RESIDENCE = "CT")

  Identifies records for students who reside in New York, New Jersey, or Connecticut.

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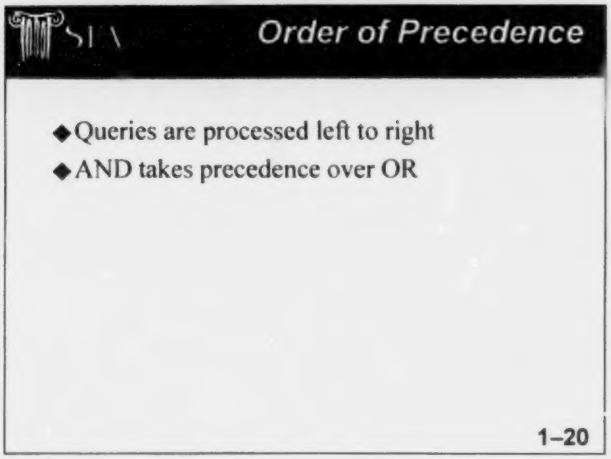


Order of Precedence

- ◆Queries are processed left to right
- ◆AND takes precedence over OR

1–20

Order of Precedence

You can use OR and AND connectors in the same query. Be sure to keep in mind the order of precedence. Queries are processed from left to right; however, AND is applied first, even if it appears after OR in the query statement.

For example,

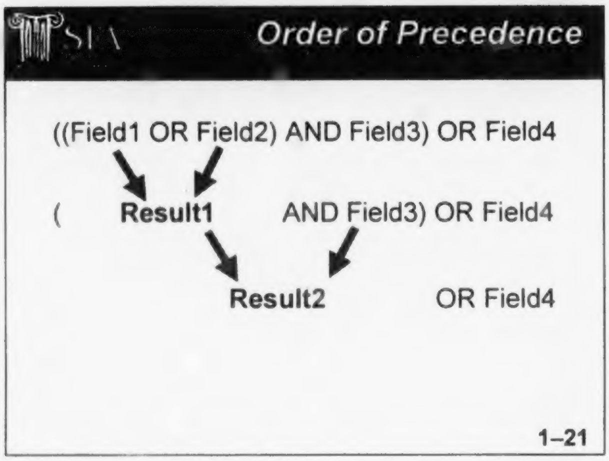
(VERIFICATION STATUS = "S") AND (DOCUMENT STATUS = "V") OR (EFC >3100)

This query first considers the two fields connected by AND and selects records that have both a verification status of "S" and a document status of "V." Then the query processes the OR connector and selects all records with an EFC greater than 3100.

Switching the AND and OR connectors would yield a very different result:

(VERIFICATION STATUS = "S") OR (DOCUMENT STATUS = "V") AND (EFC >3100)

This query first considers the two fields connected by AND, and selects records that have both a document status of "V" and an EFC greater than 3100. The query then considers the OR connector and selects all records with a verification status equal to "S."



Order of Precedence

((Field1 OR Field2) AND Field3) OR Field4

(**Result1** AND Field3) OR Field4

Result2 OR Field4

Using Parentheses

Use parentheses to further define the order of precedence. Additional parentheses create an expression by connecting two or more fields. You can use the expression in a query statement as you would use a field.

Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first. Consider this example:

((Field1 OR Field2) AND Field3) OR Field4

The expression (Field1 OR Field2) is processed first, because it's the innermost expression. Then, that result (Result1) is processed in the expression with Field3. Finally, the query processes all records that contain the value for Result2 or Field4.

Study the examples on the following page that further illustrate how parentheses are processed.

Using Parentheses in Queries

Example #1: (Field1 AND Field2 OR Field3) AND (Field4 AND Field5)

In this example, the AND portion of the expression on the left is processed first:

(**Result1** OR Field3) AND (Field4 AND Field5)

The parenthetical expression on the right is processed next, because AND takes precedence over OR.

(**Result 1** OR Field 3) AND **Result 2**.

The OR statement is processed next, because it is contained in the parentheses:

Result 3 AND **Result 2**.

The query selects all records that contain the values of both Result 3 and Result 2.

In this example, according to the rules for queries, the expression (Field1 AND Field2 OR Field3) is the same as ((Field1 AND Field2) OR Field3), because AND takes precedence over OR.

Example #2: (Field1 AND Field2) AND ((Field4 OR Field5) AND (Field6 AND Field7)) OR Field8

In this example, the expression (Field6 AND Field7) is processed first, because it's an innermost expression and it contains AND, which takes precedence over OR:

(Field1 AND Field2) AND ((Field4 OR Field5) AND **Result1**) OR Field8

Now the next innermost expression—(Field4 OR Field5)—is processed:

(Field1 AND Field2) AND (**Result2** AND **Result1**) OR Field8

Two similar parenthetical expressions remain, so they're processed next, from left to right:

Result3 AND **Result4** OR Field8

Finally, AND takes precedence over OR, so the AND portion is processed next:

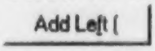
Result5 OR Field8

The query selects all records that contain the values of either Result5 or Field8.

Building a Complex Query: Instructor Demonstration

In this demonstration, we build a complex query to select records for freshman who have expressed interest in either receiving work-study or loans.

Step	Action
1	Select **Tools/Query** from the menu bar. The Query Dialog box is displayed.
2	Click the **App Express** tab. Note that many of the queries that you use in the Packaging module will be developed in App Express.
3	Select **Add** to build a new query. A blank page displays.
4	Enter the **Title**—something descriptive that readily identifies the query. In this case, enter **Freshmen Interested in Self Help Aid**.
5	Click the **Field** down arrow to see the list of available fields in App Express. With the cursor, select **Interested in Student Employment?**
6	Select the appropriate **Operator** by clicking the **down arrow** to see the full list. In this case, select =.
7	Type **1**, which means Yes, as the Value. Click the Value Help button if you need help determining the proper code to enter in this field.
8	Click the **Append** button to add the statement to the query. The following query statement displays: (**Interested in Student Employment?** = "1")
9	Click the **OR** button.
10	Select **Interested in Student Loans?** as the next data field.
11	Select = as the operator.
12	Type **1** (Yes) as the Value.
13	Click the **Append** button to add the statement to the query. A two-statement query displays.
14	Click the **AND** button.
15	Select **Grade Level in College** as the next data field.

Step	Action
16	Select <= as the operator.
17	Select 1 as the Value. Click Value Help to review the codes for Grade Level in College.
18	Click the **Append** button to add the statement to the query. A three-statement query displays.
19	Click on the first line of the query, then click the **Add Left button**:  Add Left (
20	Click on the second line of the query, then click the **Add Right button**: Add Right) The first two statements are nested within parentheses, and will be processed first.
21	Click the **Save** button.
22	Click **OK**, then **OK** again to return to the EDExpress main screen.
23	You might use this query to select records to package, print reports of records in your packaging database, export records, etc. In this case, let's test the query by printing a list of ISIRs that meet the condition. From the menu bar, select **File/Print.**
24	Click the **App Express** tab.
25	Select **List - Processed ISIRs.**
26	Select **Screen.**
27	Click **Selection Criteria.**
28	Click the **ellipsis button.**
29	Click on the title of the query. In this case, click **Freshmen Interested in Self Help Aid**.
30	Click **OK**.
31	Click **OK** again to close the Selection Criteria dialog box.
32	Click **OK** to send the list to the screen. The list of student records meeting the conditions of the query display.
33	Click **Zoom In** to magnify the list. Click **Close** to exit.

Lesson 2 Exercise

Scenario

When you arrive at work this morning, you read an e-mail from your supervisor expressing an interest in knowing the number of dependent students who have been selected for verification.

Instructions

Build a simple query in **App Express** to identify dependent applicants who have been selected for verification. Test the query by running a **List - Processed ISIRs** report.

Use **PACK** as your User ID and **PACK** as your password to enter the software.

Hint: Use the data fields **Selected for Verification** and **Dependency Status.**

Remember: Send the report to the Screen.

Note: it's important that you complete this exercise correctly, because you will be using this query later in the training session.

Review

1. What query did you use?

____

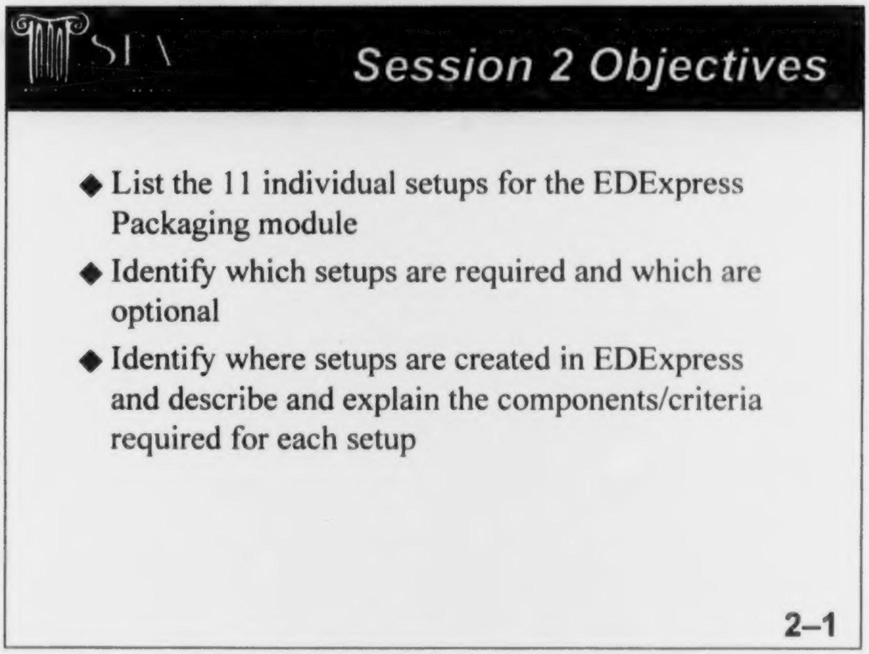
2. If you use a different connector in your query (AND/OR) would your query yield more or fewer students?

____

Session 2: System Setups

Lesson 1: Global System Setup
Lesson 2: User Database
Lesson 3: Documents
Lesson 4: User-defined Text
Lesson 5: Packaging System Setup
Lesson 6: Academic Year Profile
Lesson 7: Budgets
Lesson 8: Fund Maintenance
Lesson 9: Award Methodology
Lesson 10: Satisfactory Academic Progress
Lesson 11: User-defined Formulas

Session 2—System Setups



Session 2 Objectives

- List the 11 individual setups for the EDExpress Packaging module
- Identify which setups are required and which are optional
- Identify where setups are created in EDExpress and describe and explain the components/criteria required for each setup

Key Terms

Academic year:

A period that begins on the first day of classes and ends on the last day of classes or examinations and that is a minimum of 30 weeks (except as provided in Sec. 668.3) of instructional time during which, for an undergraduate educational program, a full-time student is expected to complete at least twenty-four semester or trimester hours or 36 quarter hours in an educational program whose length is measured in credit hours; or at least nine hundred clock hours in an educational program whose length is measured in clock hours.

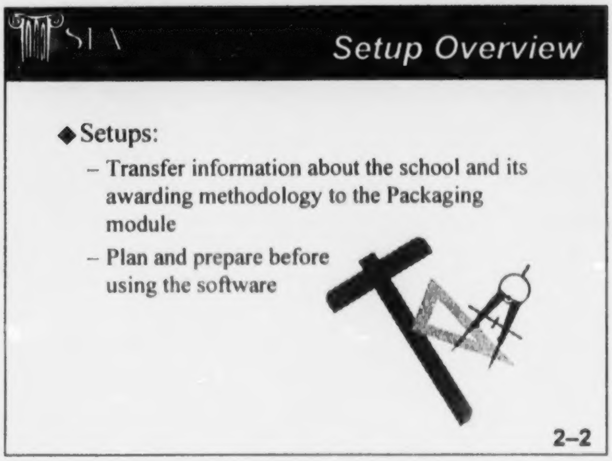
Academic Year Profile:

This is a profile you create in the software that defines your school's academic year. For each Academic Year Profile your school establishes, you may specify up to five terms for use in the Packaging process. One Pell Grant formula must be defined for the Academic Year Profile. For each of the terms within the profile, you may indicate enrollment status and aid source percentages. You are also required to define a code and title for each Academic Year Profile. The code is the key to the profile and appears on the Packaging record.

SAP:

To be eligible for SFA aid, a student must make satisfactory academic progress. Each school must have a satisfactory academic progress policy, which must contain elements specified in the regulations. A school can use satisfactory progress standards set by a state, accrediting agency, or some other organization, as long as those standards meet the federal requirements. A school must monitor its SFA recipients to ensure that they are meeting the school's satisfactory progress standards. A school's satisfactory progress policy for students receiving SFA funds must be at least as strict as the policy used for students who do not receive SFA funds. The policy must be applied consistently to all SFA recipients within identifiable categories of students (such as full-time or part-time, graduate, or undergraduate students).

Refer to the 2000-2001 Student Financial Aid Handbook, Volume 1, Student Eligibility, for more information on the satisfactory academic progress requirements.



Setup Overview

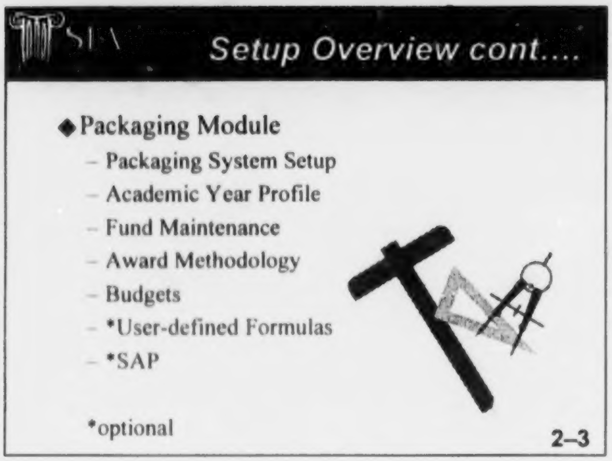
- Setups:
  - Transfer information about the school and its awarding methodology to the Packaging module
  - Plan and prepare before using the software

2–2

Setup Overview

The individual setups created in EDExpress transfer information about your school and its financial aid awarding philosophy to the Packaging module. Getting setup for packaging requires a significant amount of thought and preparation up front. Before working with the software, think about:

- The types of aid programs your school awards and administers (federal, state, institutional, other, need-based, non-need based, etc.)
- Your school's awarding philosophy, methodologies, priorities, and the makeup of your student population (U.S. citizenship, state residency, traditional, non-traditional, etc.)
- The composition of your academic programs and corresponding terms/award years (credit hour vs. clock hour, term-based vs. non-term based, standard vs. non-standard, etc.)
- The cost of attendance for programs based upon student population (special fees, housing, etc.)
- What documents you require of aid applicants before packaging
- What documents, if any, you will continue to track after packaging
- How often you want to send out document tracking letters
- What type of award letters you want to send (Offer vs. Notification)
- The maximum number of document tracking and award letters to be sent
- How many copies of letters you want to print
- How you will manage data (importing external files of data from other offices on campus, exporting files of data to share information with other offices on campus, etc.)
- How you intend to use the EDExpress Packaging software (standalone product vs. integrated with other EDExpress modules).



Setup Overview cont....

- ◆ Packaging Module
  - Packaging System Setup
  - Academic Year Profile
  - Fund Maintenance
  - Award Methodology
  - Budgets
  - *User-defined Formulas
  - *SAP

*optional

Packaging Module Setups—Overview

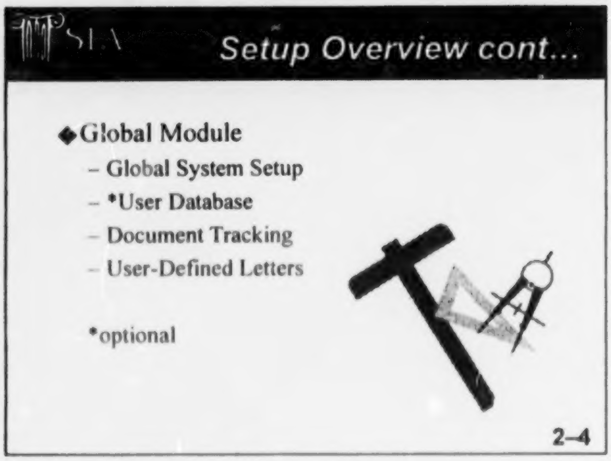
Some setups are entered in the Packaging module of EDExpress; others are entered in the Global module.

The setups entered in the Packaging module are:

- Packaging System Setup
- Academic Year Profile
- Fund Maintenance
- Award Methodology
- Budgets
- User-defined Formulas
- Satisfactory Academic Progress

Two of the setups in the Packaging module are optional: User-Defined Formulas and Satisfactory Academic Progress.

Others are inter-related and must be set up in a specific order, such as Fund Maintenance before Award Methodology.



Setup Overview cont...

◆Global Module
  - Global System Setup
  - *User Database
  - Document Tracking
  - User-Defined Letters

*optional

2-4

Global Module Setups—Overview

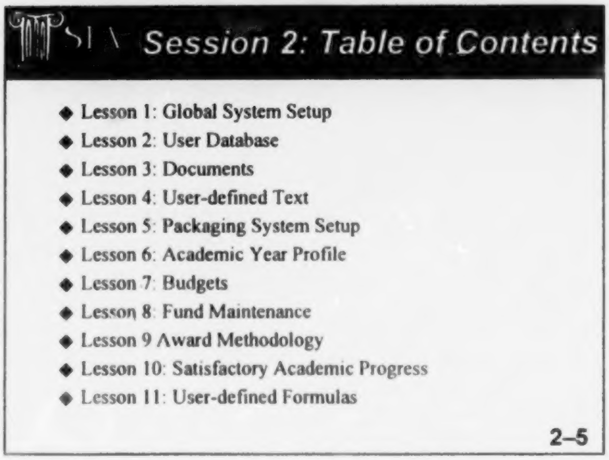
The setups entered in the Global module are:

- Global System Setup
- User Database
- Document Tracking
- User-defined Letters

The User Database setup is optional. For most schools, all of the other setups will be required.

Before working with the software, you should use the various worksheets that are provided in **Appendix A**.

Setting up the software to use the Packaging module is a major task. However, it's a task that will be easier in future years. Next year, when you receive the new version of the Packaging software, you will be able to carry-forward the Packaging setups from this year's software.



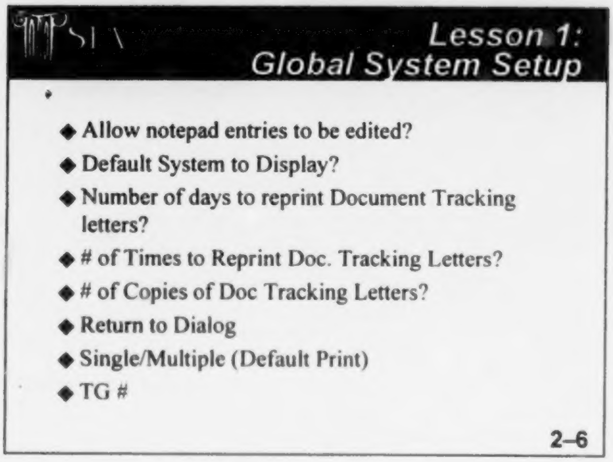
Session 2: Table of Contents

- Lesson 1: Global System Setup
- Lesson 2: User Database
- Lesson 3: Documents
- Lesson 4: User-defined Text
- Lesson 5: Packaging System Setup
- Lesson 6: Academic Year Profile
- Lesson 7: Budgets
- Lesson 8: Fund Maintenance
- Lesson 9 Award Methodology
- Lesson 10: Satisfactory Academic Progress
- Lesson 11: User-defined Formulas

2–5

Session 2: Table of Contents

In the remainder of this session, we learn how to complete each of the 11 critical setup activities. Each activity is treated as a separate lesson. For each lesson, the instructor will first explain and demonstrate the setup activity. Then you will complete the activity using your own data.



Lesson 1:
Global System Setup

- Allow notepad entries to be edited?
- Default System to Display?
- Number of days to reprint Document Tracking letters?
- # of Times to Reprint Doc. Tracking Letters?
- # of Copies of Doc Tracking Letters?
- Return to Dialog
- Single/Multiple (Default Print)
- TG #

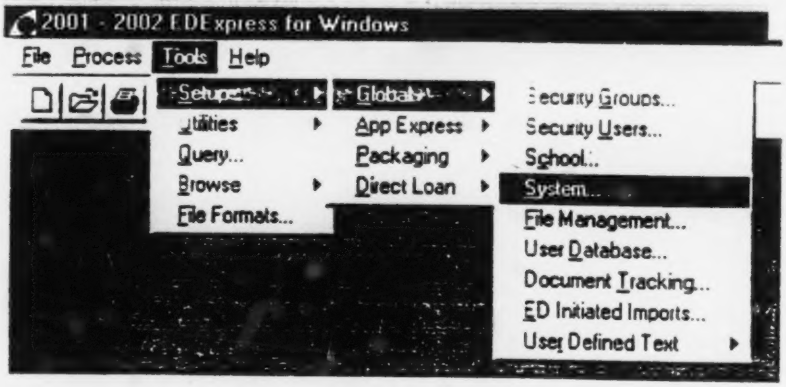
2–6

Lesson 1: Global System Setup

Although the parameters of the Global System Setup likely have been set up already by your school's system administrator, they still can be modified. It's important to note that changes made to the Global System Setup only impact processes performed from that point on.

The data elements on the Global System Setup screen are described on the following page.

Access Global System Setup by selecting **Tools/Setup/Global/System** from the menu bar.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
Security Groups...
Security Users...
School...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text

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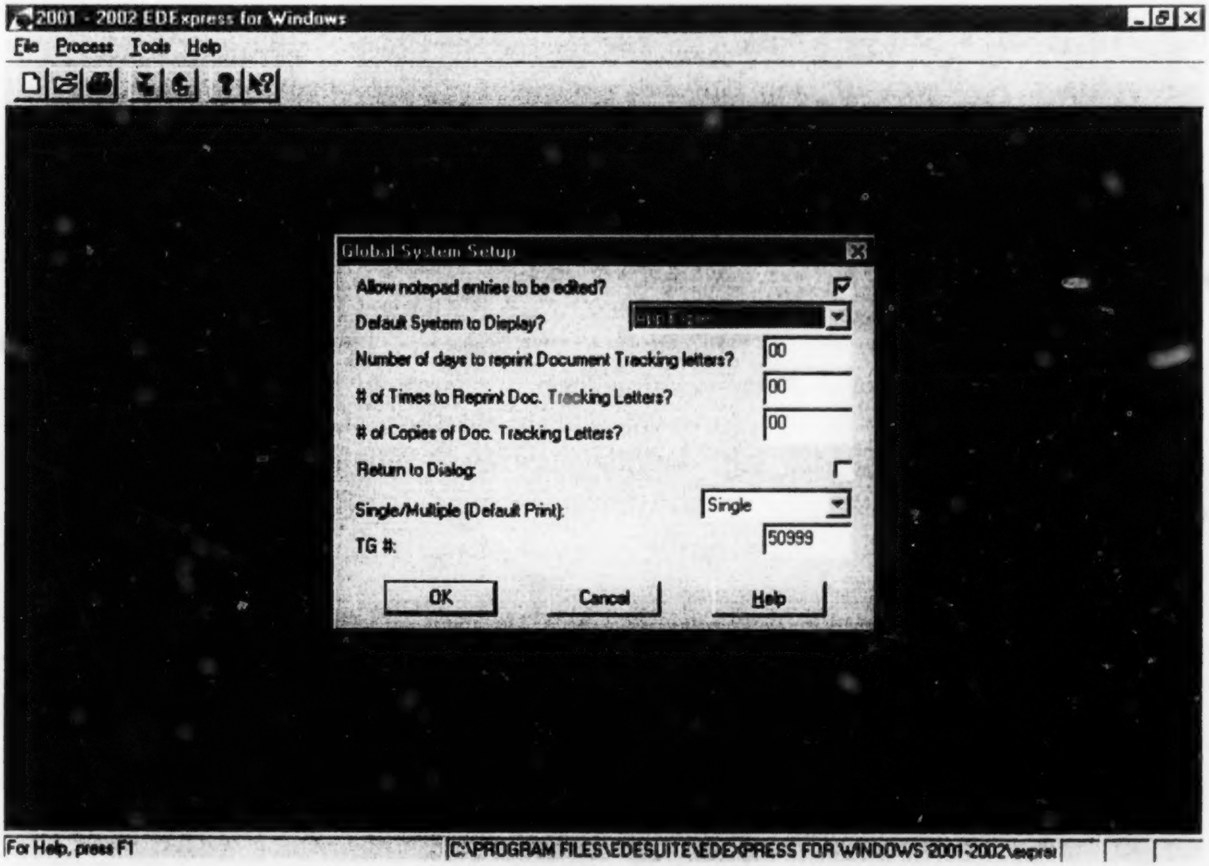
Global System Setup Data Fields

Field	Description
Allow notepad entries to be edited?	This option allows all EDExpress users to create and edit notes entries on the Notes tab of a student record. For security reasons, you may want to disable this option so only the system administrator can enter notes. If this option is disabled, other users can only view the notepad entries; they can't write any themselves. If you do choose to allow all users to create and edit note entries, only the user who entered a note or a user with specific security access (such as the system administrator) can delete or edit the note.
Default System to Display?	This option allows you to choose which EDExpress module the system defaults to when you access certain functions such as Import, Export, Print, Query, etc.
Number of days to reprint Tracking Letters?	This sets the number of days to elapse before EDExpress selects the student for another tracking letter. When printing a tracking letter for a student, the date of printing is stored on the student's record on the Docs tab. The next time you print tracking letters, EDExpress checks the student's record to see if the number of days specified in this field has elapsed and if tracking documents are still missing. If the set number of days has elapsed and documents are still missing, EDExpress prints another letter for that student. Remember, this field is updated only when you print directly to a printer or to a file, not when you print to screen.
# of Times to Reprint Document Tracking Letters?	This option sets the maximum number of document tracking letters you want to send to a student. Valid values are 00 to 99, and the default value is 00. Leave 00 in the field if you do not want to set a limit on the number of letters to print. EDExpress counts the number of times you print document tracking letters for each student. The count appears on the Docs tab in each student's record. This field is updated when you print to a printer or to a file. To continue printing document tracking letters when the maximum number of copies set for this option has been reached, you can print individual tracking letters from the Docs tab.
# of Copies of Document Tracking Letters?	This designates the number of copies of document tracking letters you want EDExpress to print for each student each time you print these letters.
Return to Dialog?	This option allows you to return to a specific dialog box when you have finished printing, exporting, importing, or using the Multiple Entry function. Otherwise, EDExpress returns you to the main menu.
Single/Multiple (Default Print):	This setting designates whether you want the system to default to printing a single record versus printing multiple student records. Select Single if you usually print one record at a time and you want Single always selected in the Print dialog box. Select Multiple if you usually print multiple records and you want Multiple always selected in the Print dialog box. You can override the system default at any time by changing this setting in the Print dialog box for a specific print job.
TG #:	The TG # is the five-character number assigned to your school upon receipt of the enrollment documentation for SAIG (formerly Title IV WAN). The TG # identifies your institution as a destination point.

Setting Global System Parameters:

Instructor Demonstration

Step	Action
1	Select **Tools/Setup/Global/System** from the menu bar.
2	The global System Setup dialog box displays.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Global System Setup
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

Allow notepad entries to be edited? ☑
Default System to Display? [illegible]
Number of days to reprint Document Tracking letters? 00
# of Times to Reprint Doc. Tracking Letters? 00
# of Copies of Doc. Tracking Letters? 00
Return to Dialog: ☐
Single/Multiple (Default Print): Single
TG #: 50999

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Setting Global System Parameters: Instructor Demonstration (continued)

Step	Action
3	Note that the Allow notepad entries to be edited? is marked, making the notepad available to you each time you access EDExpress. Leave it marked.
4	Click the **Default System to Display?** down arrow to select the EDExpress module you want to appear. In this case, select **Packaging.**
5	Enter a **14** in the **Number of days to reprint Document Tracking letters?** field for the number of days to elapse between the printing of tracking letters.
6	Enter a **3** in the **# of Times to Reprint Doc. Tracking Letters?** field for the maximum number of document tracking letters to reprint.
7	Enter a **2** in the **# of Copies of Doc. Tracking Letters?** field for the number of copies you want of each letter every time you print.
8	Leave the Return to Dialog checkbox unmarked. If you mark this box, EDExpress will return you to the dialog box when you have finished printing, exporting, importing, or using Multiple Entry.
9	Use the Single/Multiple (Default Print) down arrow to select the setting for system default printing. In this case, leave as Single.
10	Enter the number value of your school's **TG #.** In this case leave as **50999.**
11	To save the record, click **OK**.
12	The Record Updates Pending, Save Changes? Dialog box displays. Click **Yes**.
13	A Records Updates Save dialog box displays. Click **OK**. The dialog box closes and you are returned to the main menu.

Lesson 1 Exercise

Instructions

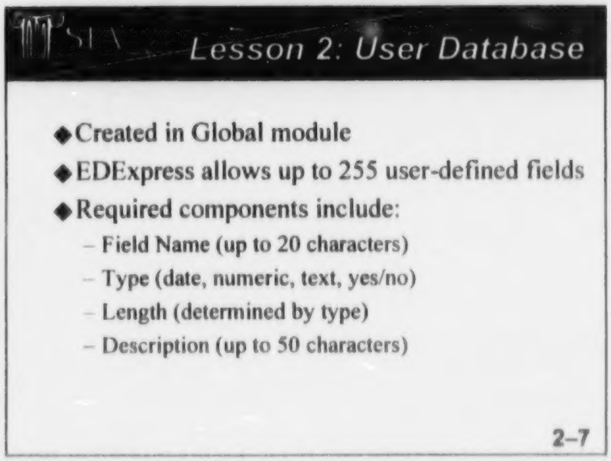
Access the Global System setup and:

- Change Default System Display? to Packaging
- Change the other fields as you would use them at your school.

Review

1. Would you use the "Number of days to reprint Document Tracking letters" option at your school? Why?

2. Would you use the "# of Times to Reprint Doc. Tracking Letters option" at your school? Why?



Lesson 2: User Database

- ◆Created in Global module
- ◆EDExpress allows up to 255 user-defined fields
- ◆Required components include:
  - Field Name (up to 20 characters)
  - Type (date, numeric, text, yes/no)
  - Length (determined by type)
  - Description (up to 50 characters)

2-7

Lesson 2: User Database

The User Database function allows you to create up to 255 user-defined fields.

Create a user-defined field if data is not captured in EDExpress (including the FAFSA) that is required in managing your financial aid records. Examples of data fields that you might need to create follow:

- GPA
- Academic major
- County of residence

Because you create these data fields at the Global System level, user-defined data is accessible to all EDExpress modules.

The data entered is stored in your User Database, but you access it by opening a student record in EDExpress and selecting the User Data tab. Here you can add or modify the student's data.

You also can print the data for a single student record, a group of records, or all of the records in EDExpress.

Before creating user-defined fields, you should try to anticipate all possible internal data needs for the upcoming cycle. EDExpress will delete any stored data if you attempt to change a user-defined field after you have entered data into the user-defined field on a student's record. However, you are free to delete, add, or modify user-defined fields before you enter student data.

Each user data field includes four components, which are described in the table on the following page.

User-Defined Fields

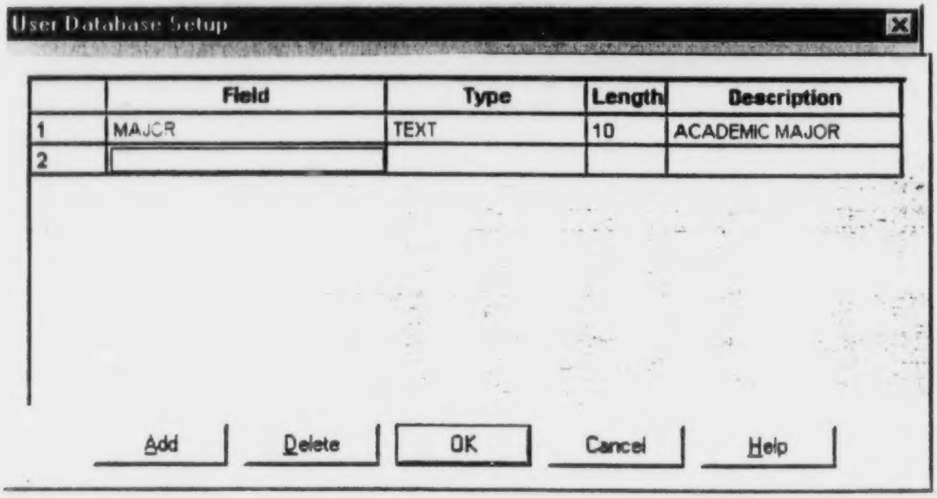
Field	Description
Name	**The field name can include up to 20 alphanumeric characters. The first character must be an alpha character**
Type	Valid data types stored in user-defined fields include Date, Numeric, Text, and Yes or No. (Because the database system stores the Yes value as "True" and the No value as "False", use True or False when querying on this Yes or No field type.) If you want a field to contain a decimal, such as the student's GPA, choose Text for the field type.
Length	The length of the field depends on the data type you select. The maximum field lengths are: Date 8 (system default) Numeric 10 Text 40 Y/N 1 (system default)
Description	The description can be up to 50 alphanumeric characters in length. This description displays when you view the user-defined field from the User Data Screen

Creating User-Defined Fields: Instructor Demonstration

Here's an example of how you might use this feature for packaging financial aid awards. Let's say you want to award a particular institutional grant (or fund) to students with a minimum GPA of 3.25. First, you create a user data field for GPA. Then, you populate this field manually or with an external data import. Once the user data field is created and populated, you create a query that selects students who meet the criteria of the fund. Finally, you package the fund based on this query.

Let's do the first step and create a field to store GPAs.

Step	Action
1	Select **Tools/Setup/Global/User Database** from the menu bar. Verify that all other users have closed out of EDExpress.
2	Click **OK** to continue. Each time you access this function, you get a message warning you that no other copies of EDExpress should be open. This message applies only to EDExpress systems that are networked, but not to stand alone systems. The User Database Setup dialog box displays. (Note that a User field has already been setup for this training that will be used in a later exercise.)



User Database Setup

	Field	Type	Length	Description
1	MAJOR	TEXT	10	ACADEMIC MAJOR
2				

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Creating User-Defined Fields: Instructor Demonstration (continued)

Step	Action
3	Click in the first available cell in the Field column and enter a field name. In this case, enter **GPA**. This will be the field label in the database. For Type, enter **Text**. For Length, enter **4**. For Description, enter **GPA,** the description you see when viewing a student's record. Note: If you want the field to include decimal places, you must select Text.
4	To add another field: Click **Add.** The system automatically adds a blank row.
5	For Field, enter **County**. For Type, enter **Text**. For Length, enter **15**. For Description, enter **County of Residence**.
6	To save your changes, click **OK**.
7	A Records Updates Pending, Save Changes dialog box displays. Click **Yes**. The dialog box closes and you are returned to the main menu.

Lesson 2 Exercise

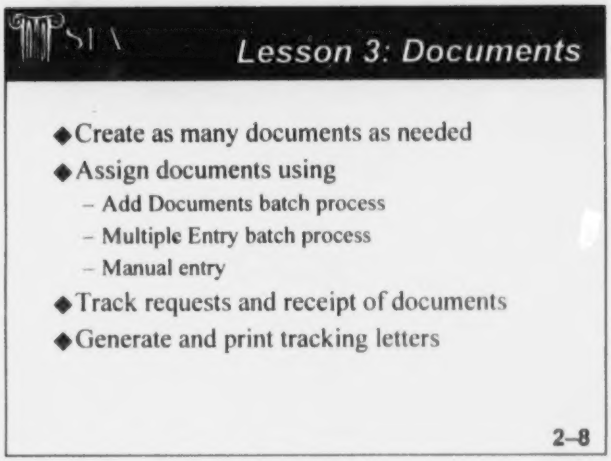
Instructions

Add at least one field to the User Database that you might use at your school.

Review

1. What field or fields did you add? How would you use those fields at your school?

2. Where in EDExpress do you add data to the user defined field that you created?



Lesson 3: Documents

- ◆Create as many documents as needed
- ◆Assign documents using
  - – Add Documents batch process
  - – Multiple Entry batch process
  - – Manual entry
- ◆Track requests and receipt of documents
- ◆Generate and print tracking letters

2–8

Lesson 3: Documents

To satisfy documentation requirements and meet institutional information needs, students may need to provide documents to the financial aid administrator. These documents might include tax returns for verification, an institutional application, etc.

Using the Document Tracking function of EDExpress, you can:

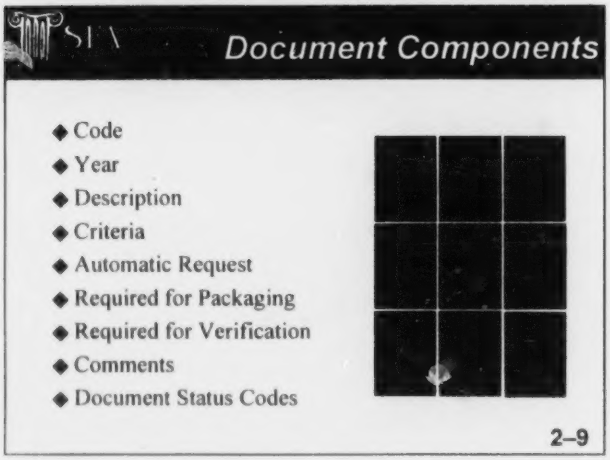
- Create as many documents as needed.
- Assign documents by using the Add Documents batch process, Multiple Entry batch process, or manual entry.
- Create document tracking letters.
- Print document tracking letters.
- Print a document tracking list by student or document code.
- Track the request and receipt of these documents.

Although Document Tracking is a global feature of the software and is not specific to Packaging functions, it can be a highly effective tool when integrated into your packaging process. Before creating documents in the software, think through how you plan to use this tracking tool.

- Will the document(s) you track be needed before students can be packaged?
- Will there be other documents that are not necessarily required for packaging but that will be required before aid can be disbursed to the student?

Then, make a list of all the documents you want to track and answer the following questions for each:

- How often do you want to send out document tracking letters requesting the documents?
- What is the maximum number of times these document request letters will be sent?
- How many copies of the document tracking letters do you want the system to print?



Document Components

- ◆ Code
- ◆ Year
- ◆ Description
- ◆ Criteria
- ◆ Automatic Request
- ◆ Required for Packaging
- ◆ Required for Verification
- ◆ Comments
- ◆ Document Status Codes

2–9

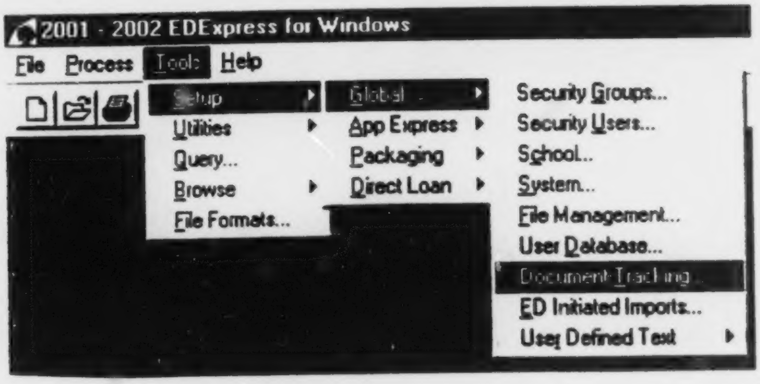
Document Components

For each document you decide to track, you will need to define the following:

- Code
- Year
- Description
- Criteria
- Automatic Request
- Required for Packaging
- Required for Verification
- Comments
- Document Status Codes

A description of each of these data fields is provided on the following page.

To setup documents, select **Tools/Setup/Global/Document Tracking** from the menu bar.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
Security Groups...
Security Users...
School...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text

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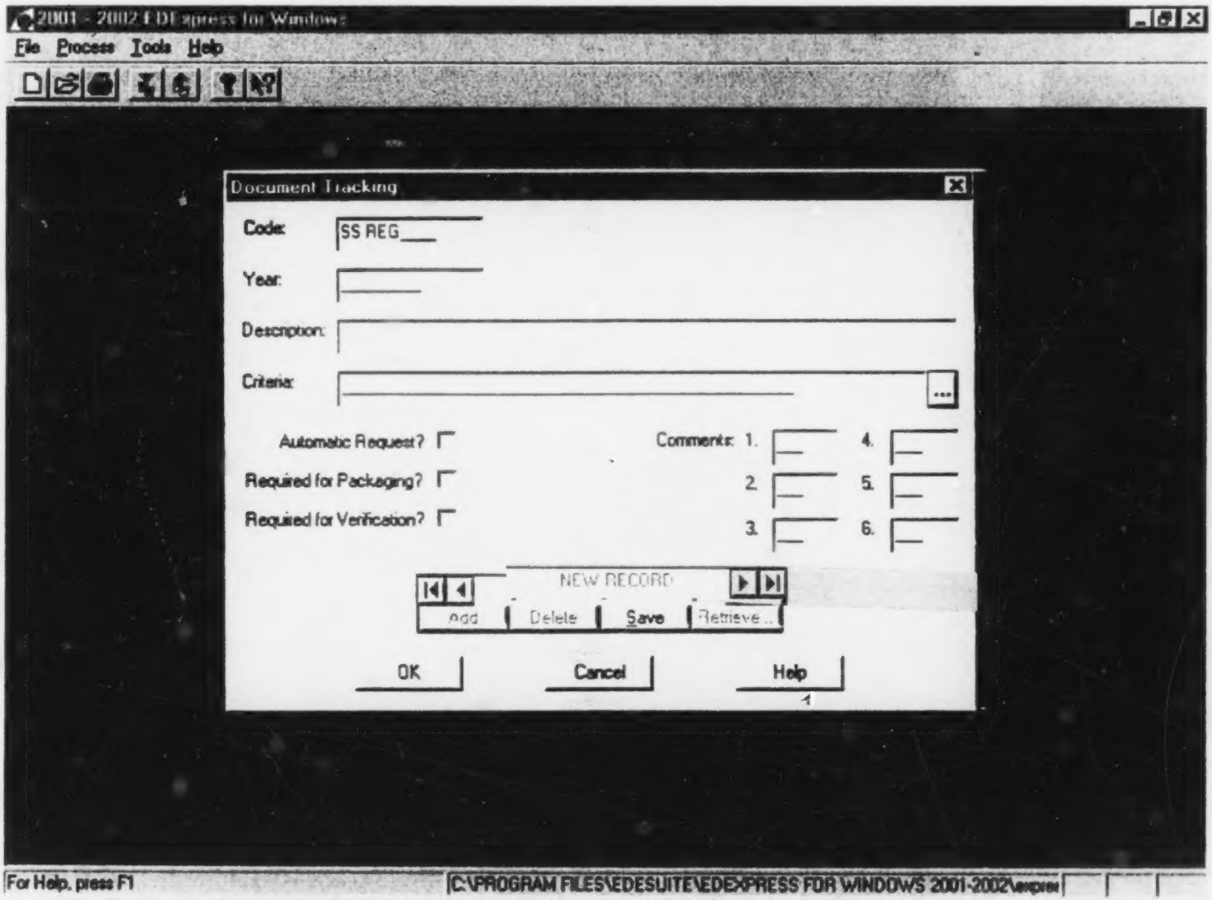
Document Components

Field	Description
Code	**The document code is a required field that identifies the document profile. The code you select can include up to 10 alphanumeric characters. When space is available, this code prints on reports and displays on screens. You cannot modify the code once the document record is saved. To change a code, you must delete the document and start over. However, you can only delete a document that has not been assigned to a student record.**
Year	The year identifies the award year for which the document is tracked and appears on the document tracking letter. The year is optional.
Description	The document description is a required field. The description you enter can be up to 50 alphanumeric characters and appears on document tracking letters.
Criteria	Using Criteria allows you to use a query created in the Apps Module to identify students who should receive a request for this document. The query must be created before you set up the document.
Automatic Request	Selecting the Automatic Request option instructs the system to assign the document according to the query you specify under Criteria and/or to the ISIR comment codes under Comments.
Required for Packaging	This option allows you to require that the document be tracked as received or waived before a student's aid can be packaged. When you select this option, you also must select either the Automatic Request option **or** the Required for Verification option to have the document assigned. A document required for packaging cannot be added to a student record that already has been packaged.
Required for Verification	This option has the system assign the document to students selected for verification, i.e., the Pell Verification Status field on the demographic record is not equal to N. If you select this option, you do not also have to select the Automatic Request option. Also, if you assign the document to all students selected for verification, without regard to dependency status, no selection criteria is needed.
Comments	This option allows you to assign documents based on comment codes on the ISIR. You can associate up to six comment codes with this document. If you include more than one comment code, EDExpress adds the document when any of the comment codes you include are on the student's ISIR. If you select both the Criteria and Comment options, EDExpress adds the document only if the student's demographic record meets the selection criteria and if the student's ISIR has at least one of the comment codes.
Document Status Codes	Each document assigned to a student record has a status in EDExpress. This status determines if the document is going to be tracked and requested when document tracking letters are printed. Possible status values are: N = Needed I = Incomplete R = Received D = Received not reviewed W = Waived Note that D (Received not reviewed) is a new code for 2001-2002. It can be used to prevent a record from being packaged even if the required document has been received.

Creating Documents: Instructor Demonstration

Let's review the steps to creating a document. In this example, we want to request a document and track the receipt of evidence that male applicants have registered with Selective Service.

Step	Action
1	Select **Tools/Setup/ Global/Document Tracking** on the menu bar. The Document Tracking dialog box displays. If document tracking records don't already exist in the system, continue to step 2 below. In this case, they do. So, click **Add**.
2	Enter a unique Code of up to 10 alphanumeric characters to identify this document. In this case, enter **SS REG**.



Document Tracking

Code: SS REG

2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Year:
Description:
Criteria:
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments: 1.
2.
3.
4.
5.
6.
NEW RECORD
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

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Creating Documents: Instructor Demonstration (continued)

Step	Action
3	In the Year field, enter the award year to which this document applies. In this case, enter **2001-2002.** This value will print on the document tracking letter.
4	Enter a complete Description of the document (up to 50 alphanumeric characters). In this case, enter **Proof of Selective Service Registration**.
5	Click the **ellipsis button** and select from the list of available queries. In this case, click **Male Applicants**, and then click **OK**. The query will select male applicants only since you would not track Selective Service registration for females. (Note that this query was created in advance for this training.)
6	Mark any of the following three checkboxes. In this case, mark **Automatic Request?** to automatically request the document from all male applicants. Also, mark **Required for Packaging?** to require that the document be received before a student's aid can be packaged. Leave Required for Verification? unmarked.
7	If you want to track this document based on ISIR comment codes, enter up to 6 codes under comments. The document is assigned to the student if any one of the comment codes appears on the student's record. In this case, enter **030**.
8	Click **Save** to save the record.
9	Click **OK** to continue.
10	Click **OK** to exit this setup.

Lesson 3 Exercise

Instructions

Create a document that you need to track for students who are selected for verification. Use a Query to define the group of students who are required to submit the document. Use the Document Tracking Worksheet that is found in Appendix A, if necessary.

Before starting, think of all the documents that you might require from students who have been selected for verification. At a minimum, the student's tax return, the parent's tax return, and the Verification Worksheet are needed.

Consider the following:

- In addition to the documents identified above, are others needed?
- What requirement options are you going to assign the documents?
    - Automatic Request
    - Required for Packaging
    - Required for Verification
- Should you assign ISIR comment codes?
- Do you need to create queries in the App Express module to assign the documents to the appropriate student populations?
- Is there an existing query in the App Express database that you can modify or use to create a new query, if needed? Hint: use the query that you created in Session 1 to identify dependent applicants who have been selected for verification.

Review

True of False:

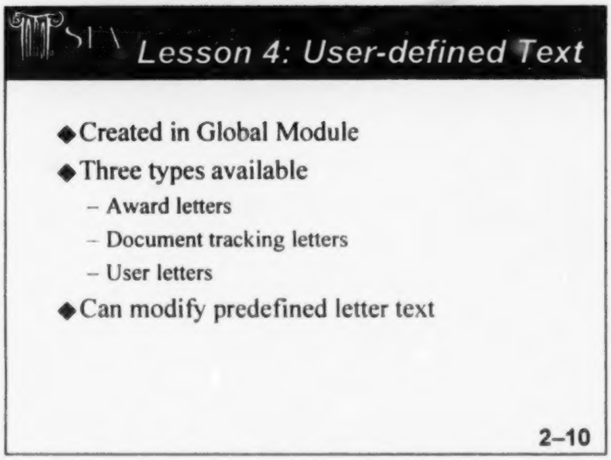
1. ________ If a document has a status of N it means that you have not received the document from the student.

2. ________ You must use the Criteria field each time you enter a document to track.

3. ________ If you have entered a Criteria or Comment for a document, you must mark the Automatic Request? box.

4. ________ Mark the Required for Packaging? box if you want to make sure the document has been received before you award aid to students.

5. ________ You must use one or more of the Comment fields each time you enter a document to track.



Lesson 4: User-defined Text

- ◆Created in Global Module
- ◆Three types available
  - – Award letters
  - – Document tracking letters
  - – User letters
- ◆Can modify predefined letter text

2–10

Lesson 4: User-Defined Text

According to settings you define in Global module, you can create and print three categories of letters in EDExpress.

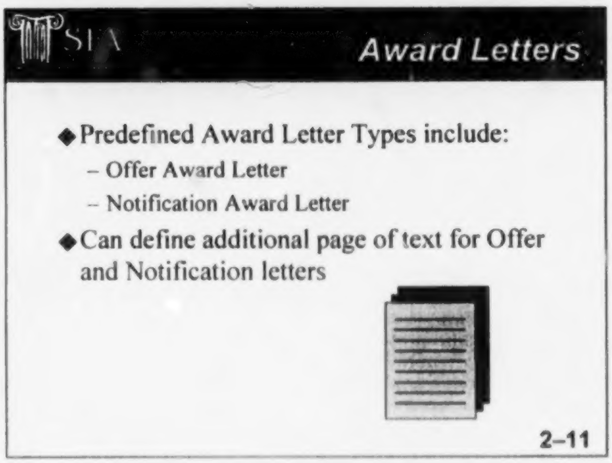
- Award letters
- Document tracking letters
- User letters

Award letters and document tracking letters include predefined texts, fixed formats, and optional print features. You can make minimal changes to predefined texts but none to fixed formats (e.g., line spacing, margins). When you generate a document tracking or award letter and print either to the printer or to a file, the student's record is updated to show that the letter was printed.

For both award and document tracking letters, you can create additional text. The user-defined text you create for award letters prints as a cover page to award letters. For document tracking letters, the additional text prints as introductory text. You also have the ability to define up to five general purpose or user letters. Additional features of the various letter types include:

- A two-line heading identifying the letter type (award or document tracking) or name (user-defined) and the award year prints centered on the top of each page.
- The date and the student's name and address appear on the upper left side.
- Your institution's name and address, as well as the student ID, appear on the upper right side.
- The salutation "Dear Student" appears flush to the left margin.
- A signature appears on the bottom left side.
- For all letter types, you can use selection criteria (i.e., a query) to specify which students should receive the letters.

Refer to Appendix B to see samples of each letter type.



Award Letters

- Predefined Award Letter Types include:
  - Offer Award Letter
  - Notification Award Letter
- Can define additional page of text for Offer and Notification letters

2–11

Award Letters

EDExpress offers two predefined award letters:

- Offer letter
- Notification letter

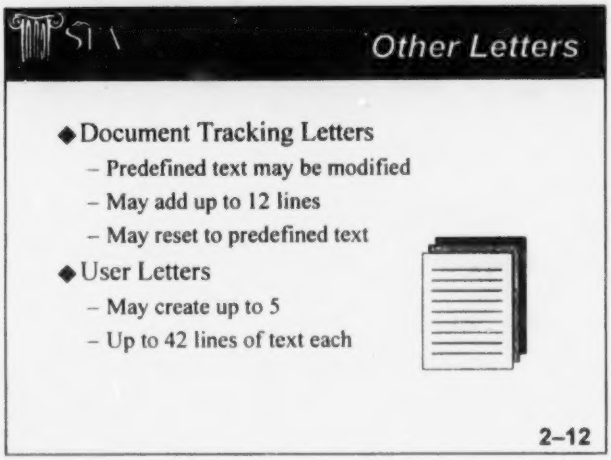
The Offer and Notification letters report to the student the amount(s) and type(s) of aid awarded. These letters also provide a place for the student to indicate that each award listed is accepted or declined. If you choose, both types will print the student's need analysis above the list of awards.

Although both include an optional signature section, the wording for each differs. The Notification letter advises that action is required of the student only if any of the awards are declined. On the other hand, the Offer letter requires that the student sign a copy of the letter and return it to the school by a specified date. In addition, EDExpress allows you to track the receipt of the student's acceptance of an Offer letter.

Both types of letters allow you to add up to 40 lines of additional user-defined text. User-defined text does not overwrite predefined text and prints as a cover page to the award letter. Beginning with the 2001-2002 software, a "Dear Student" greeting has been provided, which can be modified. In addition, you can choose to generate a separate Missing Documents letter.

In the Packaging System Setup, you set the system default for the type of award letter you want the system to batch generate and print—Notification or Offer.

Note: At the student packaging record level, the system only generates and prints the Offer letter, even if you set the Packaging System default to Notification.



Other Letters

- Document Tracking Letters
  - Predefined text may be modified
  - May add up to 12 lines
  - May reset to predefined text
- User Letters
  - May create up to 5
  - Up to 42 lines of text each

2–12

Document Tracking Letters

The Document Tracking letter requests that the student submit documents needed to satisfy institutional requirements and to complete the financial aid process. For example, you might request documents that are needed to package a student's financial aid, while others might be needed to disburse aid previously awarded.

You can modify the predefined text; you can restore the original default text at any time; and you can include up to 12 lines of additional user-defined text.

User Letters

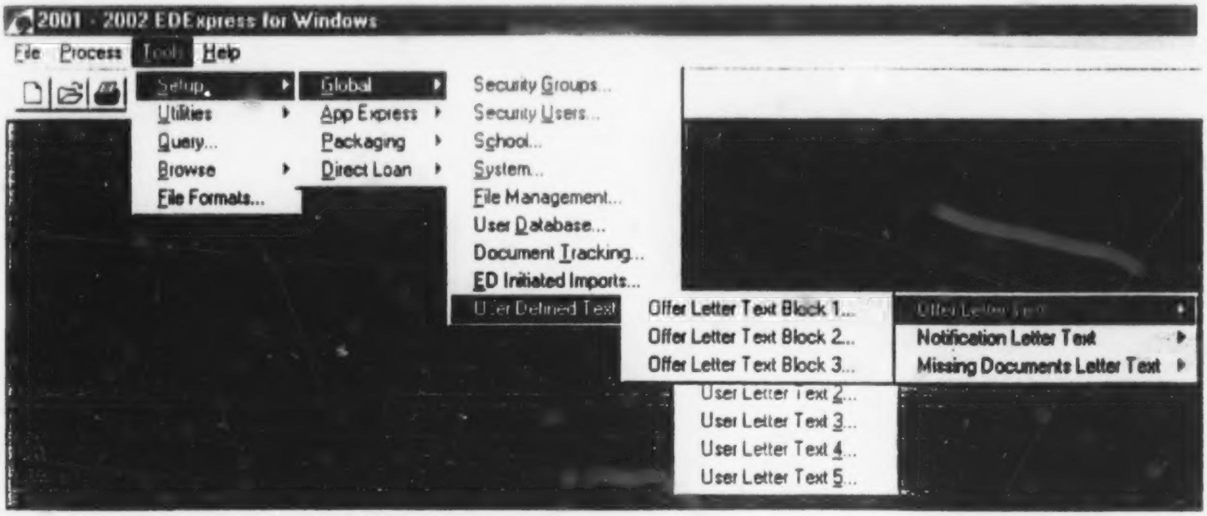
You can use User letters to create general purpose letters. For example, you might create a User letter to notify first-time student borrowers of loan entrance counseling sessions. Or you might send an advisement to students not making Satisfactory Academic Progress.

EDExpress allows you to create up to five User letters, and each may include up to 42 lines of text. When you create User letters, you have the option to specify a letter name or title. This title displays when you print User letters.

Creating Award Letter Text: Instructor Demonstration

For each type of predefined award letter, Offer and Notification, you can create additional text that generates and prints as a cover page. Use this text to include messages specific to your school's practices. The following example demonstrates how to create additional text for an Offer letter. The same steps are followed for creating additional text for Notification and Missing Documents letters.

Step	Action
1	Select **Tools/Setup/ Global/User-Defined Text** on the menu bar. Three categories of letters display: Award, Document Tracking, and User.
2	Select **Award Letter Text**. Three types of award letters display: Offer, Notification, and Missing Documents.
3	Select **Offer Letter**. Three text box options display: Text Block 1, Text Block 2, Text Block 3. Offer Text Blocks 2 and 3 contain predefined text.
4	Select **Offer Letter Text Block 1**.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
Security Groups...
Security Users...
School...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text
Offer Letter Text Block 1...
Offer Letter Text Block 2...
Offer Letter Text Block 3...
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
Offer Letter Text
Notification Letter Text
Missing Documents Letter Text

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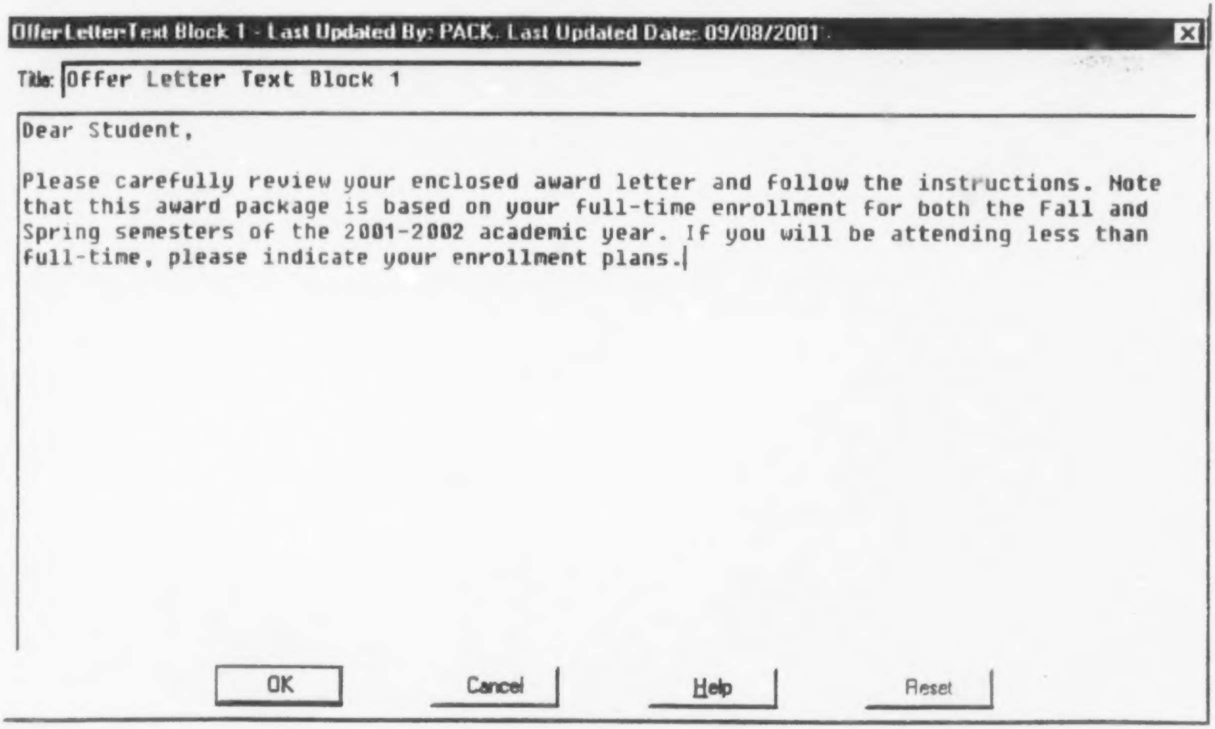
Creating Award Letter Text: Instructor Demonstration (continued)

Step	Action
5	The Offer Letter Text Block 1 displays. (Note that for the purposes of this training session, text has been already entered. This award letter will be used later in the training.) In Text Block 1, additional user-defined text is created. The text that you create prints as a cover page to the Offer letter. Modify the text that has been provided as part of this training. Up to 42 lines of free-form text are allowed.
6	Click **OK** to save the text. A Record Updates Pending, Save Changes dialog box displays.
7	Click **Yes**. Click **OK**.
8	Text Block 2 and Text Block 3 contain predefined text. To modify this text, follow Steps 1 through 8 and select the text to be modified.



Offer Letter Text Block 1 - Last Updated By: PACK, Last Updated Date: 09/08/2001

Title: Offer Letter Text Block 1

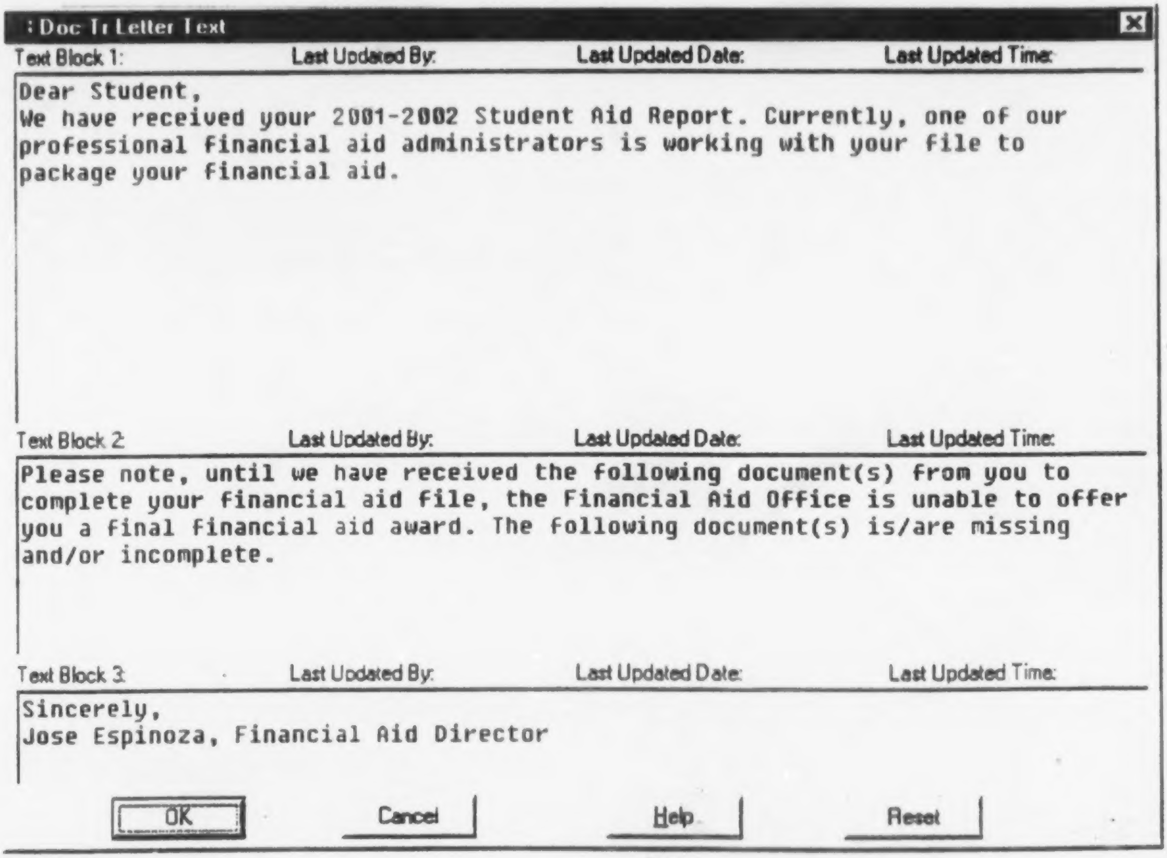
Dear Student,

Please carefully review your enclosed award letter and follow the instructions. Note that this award package is based on your full-time enrollment for both the Fall and Spring semesters of the 2001-2002 academic year. If you will be attending less than full-time, please indicate your enrollment plans.

Creating Document Tracking Letter Text: Instructor Demonstration

You can create up to 12 lines of additional text for Document tracking letters. You can also modify predefined text. In this demonstration, we create additional text for your Document Tracking letters.

Step	Action
1	Select **Tools/Setup/ Global/User-Defined Text/Doc Tr Letter Text** on the menu bar. The Doc Tr Letter Text dialog box displays.
2	The dialog box is divided into Text Block 1, 2, and 3. In Text Block 1, enter up to 12 lines of additional text. (Note the text has been provided as part of this training. Normally, this block would be blank.) In Text Block 2, modify the predefined text, as needed. In Text Block 3, modify the predefined letter closing, as needed.
3	To save all blocks of text, click **OK**. Then click **Yes**, and **OK** again.


Doc Tr Letter Text
Text Block 1:
Last Updated By:
Last Updated Date:
Last Updated Time:

Dear Student,
We have received your 2001-2002 Student Aid Report. Currently, one of our professional financial aid administrators is working with your file to package your financial aid.

Text Block 2:
Last Updated By:
Last Updated Date:
Last Updated Time:

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Text Block 3:
Last Updated By:
Last Updated Date:
Last Updated Time:

Sincerely,
Jose Espinoza, Financial Aid Director

OK
Cancel
Help
Reset

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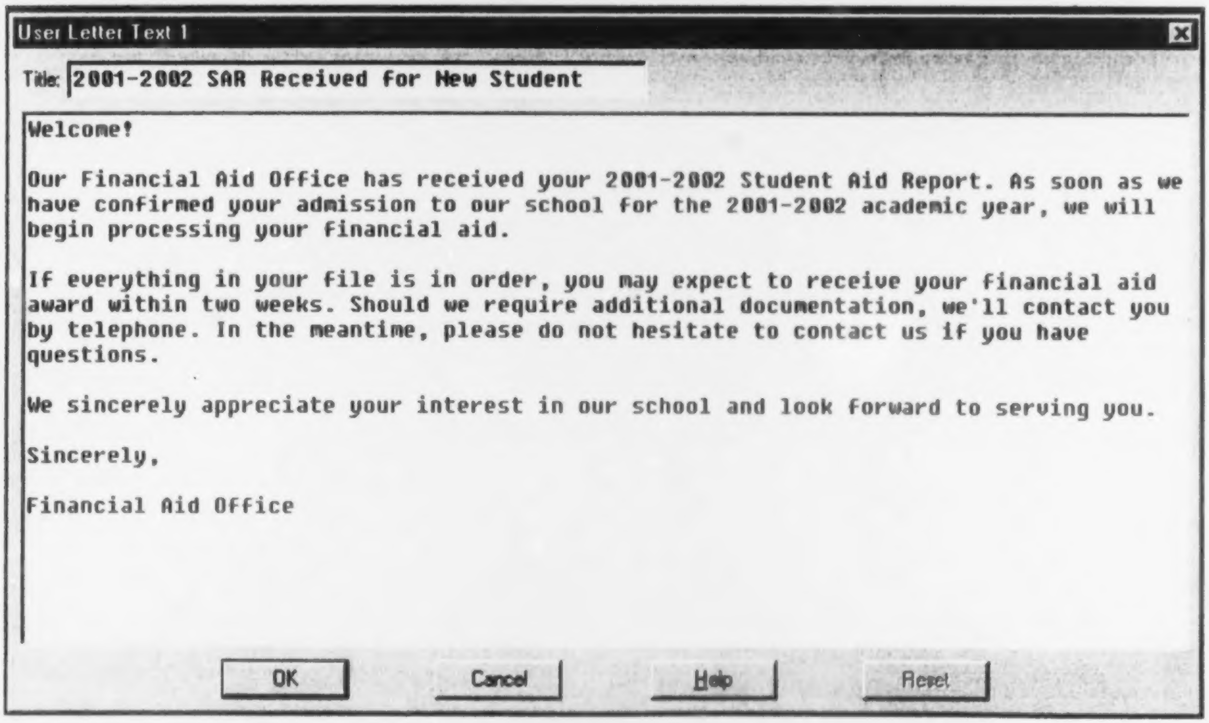
Creating User Letter Text: Instructor Demonstration

The EDExpress User Letters option allows you to define up to 5 standard or general purpose letters to send to students. In the example that follows, we'll work with User Letter 1.

Step	Action
1	Select **Tools/Setup/ Global/User-Defined Text/User Letter Text 1** on the menu bar. The User Letter 1 dialog box displays. (Note that text has been provided for the purposes of this training. Normally, this text block would be blank.)
2	Modify the Title for User Letter 1 that has been provided as part of this training. When you print User Letter 1, the Print dialog box displays the title of the letter.
3	Enter up to 42 lines of text.
4	To save the text, click **OK**.
5	Click **Yes**.
6	Click **OK** again.



Title: 2001-2002 SAR Received for New Student

Welcome!

Our Financial Aid Office has received your 2001-2002 Student Aid Report. As soon as we have confirmed your admission to our school for the 2001-2002 academic year, we will begin processing your financial aid.

If everything in your file is in order, you may expect to receive your financial aid award within two weeks. Should we require additional documentation, we'll contact you by telephone. In the meantime, please do not hesitate to contact us if you have questions.

We sincerely appreciate your interest in our school and look forward to serving you.

Sincerely,

Financial Aid Office

Lesson 4 Exercise

Instructions

Enter and save a document tracking letter.

Review

Read each statement and fill in the blank(s).

1. User-defined letters are created in the _______________ module.

2. The three categories of user-defined letters that you can create in EDExpress are _______________, _______________, and _______________.

3. EDExpress provides two types of award letters that are typically sent to students, the _______________ or _______________.

4. The system default indicating which type of award letter to generate is selected in the _______________ System setup.

5. EDExpress also gives you the option of including with the award letter a _______________ letter, which prints as a supplemental page to remind the student of documents that are needed.

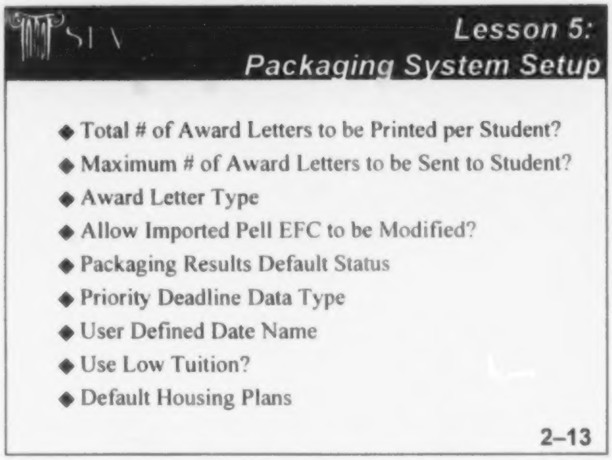
6. If you choose to create additional text for the award letter, this additional text prints as ____.

7. In the User-Defined Text setup, Document Tracking Letters include 2 blocks of text. You can create up to 12 lines of additional text in Text Block _______________.

8. In Text Block _______________ of Document Tracking Letters, you can modify the predefined text.

9. To restore predefined text for both Award and Document Tracking Letters, you select the _______________ button in User-Defined Text setup.

10. You can create up to _______________ general purpose User Letters to send to students.



Lesson 5:
Packaging System Setup

- ◆ Total # of Award Letters to be Printed per Student?
- ◆ Maximum # of Award Letters to be Sent to Student?
- ◆ Award Letter Type
- ◆ Allow Imported Pell EFC to be Modified?
- ◆ Packaging Results Default Status
- ◆ Priority Deadline Data Type
- ◆ User Defined Date Name
- ◆ Use Low Tuition?
- ◆ Default Housing Plans

2–13

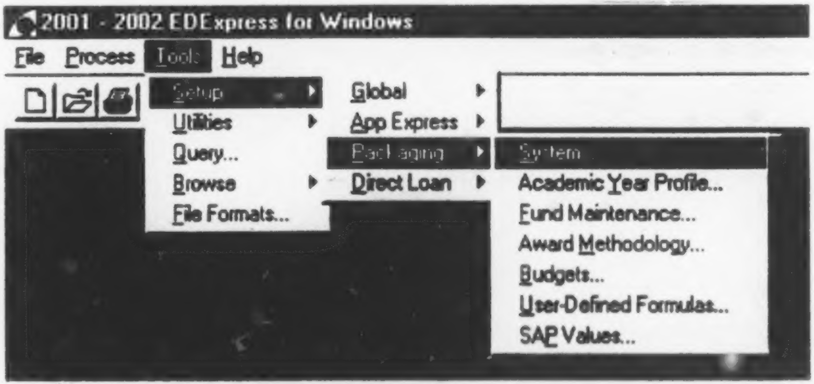
Lesson 5: Packaging System Setup

The Packaging System Setup controls parameters for the following functions:

- Total Number of Award Letters to be Printed per Student?
- Maximum Number of Award Letters to be Sent per Student?
- Award Letter Type
- Allow Imported Pell EFC to be Modified?
- Packaging Results Default Status
- Priority Deadline Date Type
- User-Defined Date Name
- Use Low Tuition?
- Default Housing Plans

A description of each of these data fields is provided on the following page.

To set up the packaging system, select **Tools/Setup/Packaging/System** from the menu bar.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
System
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values...

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Packaging System Setup Fields

Field	Description
Total Number of Award Letters to be Printed per Student?	**Specify the number of copies generated each time you print a student's award letter. Valid values are 1 to 99. The default number is 2.**
Maximum Number of Award Letters to be Sent per Student?	Specify the total number of times an award letter for an individual student will be printed. Valid amounts are 1 to 99. The default value is 5.
Award Letter Type	Specify the type of award letter that will be printed—O (Offer Letter) or N (Notification Letter). Although these letter types are informational and don't impact the system in any way, you may want to match the Award Letter Type with the Packaging Results Default Status.
Allow Imported Pell EFC to be Modified?	Clicking this checkbox allows the Pell EFC imported from the ISIR to be modified and ensures that the Pell EFC can be recalculated.
Packaging Results Default Status	Specify the default option—O (Offered) or A (Accepted)—you want displayed as the packaging results status for each fund when a student is packaged. The default value can be modified at the student level.
Priority Deadline Date Type	Specify the date type you want to use to prioritize the order in which student records will be packaged. Default options are A (Received Date from ISIR), P (Processed Date from ISIR), R (Ready Date based on date ISIR record is imported into Packaging database), and U (User Defined Date from User Database).
User-Defined Date Name	If you select U as your Priority Deadline Date Type, select the Priority Deadline Date you wish to use from the list of User-defined Dates created in the User Database. This field is enabled only if the Priority Deadline Date Type is set to U.
Use Low Tuition?	Select this option to use the Alternate Pell Grant Payment Schedules for Students with Low Assessed Tuition.
Default Housing Plans	Indicate the default housing value for records created manually and for ISIRs imported with a blank housing code. Valid values are 1 (On-campus), 2 (Off-campus), and 3 (With parents). The system default value is 2. Note that the label for this field is new for 2001-2002. In the 2000-2002 software it is "Default Housing Status."

Setting Up Packaging System: Instructor Demonstration

In this demonstration, we review the Packaging System Setup dialog box.

Step	Action
1	Select **Tools/Setup/ Packaging/System** on the menu bar. The Packaging System Setup dialog box displays.
2	Enter **3** in Total Number of Award Letters to be Printed per Student?
3	Enter **4** for Maximum Number of Award Letters to be Sent per Student?
4	Leave the Award Letter Type as **O** for Offer Letter.
5	Mark **Allow Imported Pell EFC to be Modified?** Enabling this checkbox ensures that the Pell EFC can be recalculated when working with packaging records.
6	Change the Packaging Results Default Status to **A**, for accepted.
7	Click the **Priority Deadline Date Type** down arrow and select **A** for Application Received Date. Note: The User Defined Date Name field is enabled only if the Priority Deadline Date Type is U. Remember, if the field is enabled, the user-defined date must already exist in the User Database.
8	If you want the system to use the Alternate Pell Grant Schedules for Students with Low Assessed Tuition, click the Use Low Tuition? checkbox. In this case, leave the checkbox unmarked.
9	Click the **Default Housing Plans** down arrow to select the default housing value for records created manually and for ISIRs imported with a blank housing code. In this case select **1** for On-campus.
10	Click **OK** to save. A Record Updates Pending, Save Changes dialog box displays.
11	Click **Yes**. A Record Updates Saved dialog box displays.
12	Click **OK**.

Lesson 5 Exercise

Instructions

Access Packaging System Setup and review. Make any changes needed. Access the help system for this dialog box.

Review

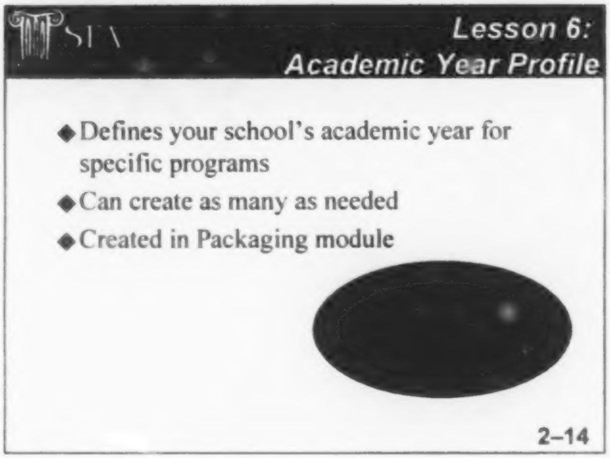
True of False:

1. ________ Packaging System Setup gives you control over how many copies are produced each time you print a student's award letter.

2. ________ A P entry in Priority Deadline Date Type means that records will be packaged according to the date they were processed at the CPS.

3. ________ If nearly all of your students lived on campus, you would want to set the Default Housing Code to 1.

4. ________ Packaging System Setup gives you control over how many copies are produced each time you print Document Tracking Letters.



Lesson 6: Academic Year Profile

- Defines your school's academic year for specific programs
- Can create as many as needed
- Created in Packaging module

2–14

Lesson 6: Academic Year Profile

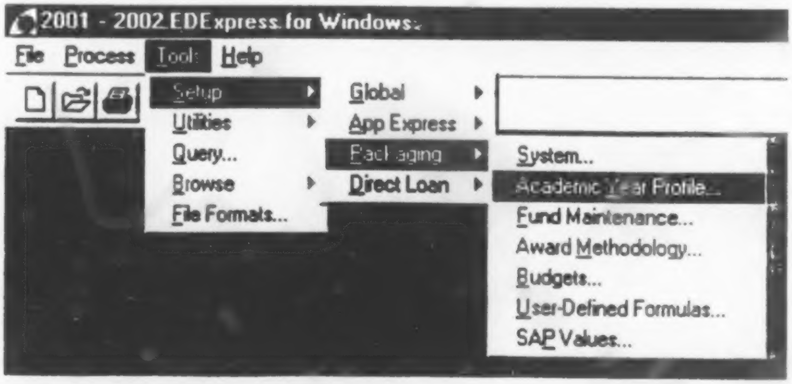
An Academic Year Profile (AYP) defines your school's academic year for a program of study and specifies how you want to package financial aid.

Some schools may have only one profile, while others must create multiple profiles to accommodate various programs of study. For example, your school may have academic programs with different start dates. Or perhaps your school has programs of varying lengths.

Because the EDExpress Packaging module is designed to provide maximum flexibility, you are able to create as many AYPs as you need.

You may delete or edit an Academic Year Profile as long as that profile has not been assigned to a student packaging record. It is important to note that an AYP must be assigned in order to package a student record. However, once a student record is packaged, the AYP code for that record cannot be changed.

To setup an Academic Year Profile, select **Tools/Setup/Packaging/Academic Year Profile** from the menu bar.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values...

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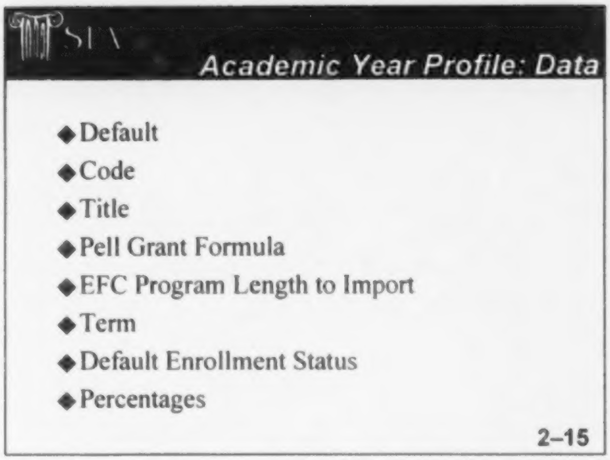

Academic Year Profile: Data

- ◆Default
- ◆Code
- ◆Title
- ◆Pell Grant Formula
- ◆EFC Program Length to Import
- ◆Term
- ◆Default Enrollment Status
- ◆Percentages

2–15

Academic Year Profile: Data

To setup an Academic Year Profile, you need to transfer various information about your school to the software. This information includes:

- Whether or not the AYP should default onto each student record
- Four-character code
- Descriptive title
- Pell Grant formula and appropriate program proration percent
- EFC program length to import from the ISIR database
- Terms (you may specify up to five) for use in the Packaging process
- Default enrollment status for each term
- By fund type, percentage of aid dollars to be allocated across terms

A description of each data element is provided on the following pages.

Academic Year Profile Fields

Field	Description
Default	Although you are able to create as many AYPs as needed, you may designate only **one** AYP as the default profile. The default profile is automatically assigned to student packaging records when you import ISIRs from the App Express database. This default value can be changed each time you import ISIRs. Changing the default AYP does not impact profiles previously assigned to student packaging records.
Code	This field cannot be blank; it must contain a unique code of up to four characters that identifies the particular profile or methodology. The code can consist of any combination of uppercase letters (A-Z) and numbers (0-9). When space is available, this code prints on reports and displays on screens. You cannot change the code after you have added the AYP record to the database. To change the code, you must delete the AYP record and start over. However, you can only delete an AYP that has not been assigned to a student record.
Title	This field cannot be blank; it must contain a description of the AYP. When space is available, the title prints on reports and displays on screens. Titles can consist of any valid keyboard character, except the pipe symbol (|). You cannot change the title once a student packaging record has been assigned to the AYP.
Pell Grant Formula	This field cannot be blank; it is based on your school's definition of an academic year. Your Pell Grant formula selection determines whether you need to complete the Program Proration Percent and the Pell % fields. Use the table below to decide what to complete. An X means you must complete the field.

Pell Grant Formula	Program Proration Percent	Pell %
1 Standard term, credit hour programs (30 weeks)		
2 Standard term, credit hour programs (<30 weeks)	X	
3 Any term based credit hour programs		X
4 Clock hour and credit hour programs without terms	X	X
5 Correspondence Study- non term-based program	X	X
6 Correspondence Study- term-based program *Correspondence-based programs may use either Pell Grant Formula 5 or 6.* *Pell Grant Formula 5 should be used for all Correspondence programs without terms. Pell Grant Formula 6 should be used for all Correspondence programs with terms.*		X

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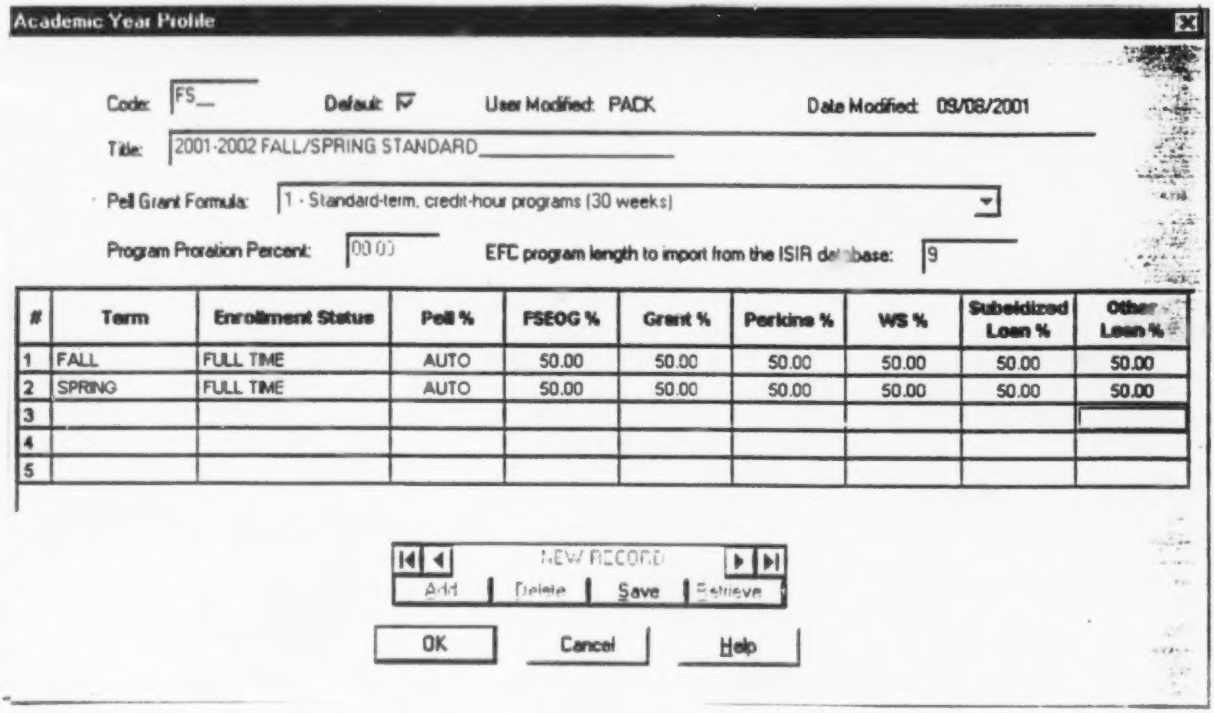
Academic Year Profile Fields (continued)

Field	Description
EFC Program Length to Import from the ISIR database	**This field identifies the EFC program length (usually 9 months) for student packaging** records created by ISIR imports. Pell will always import the 9 month EFC. The system uses this value to calculate the student's EFC.
Term	This field identifies a specific term and can include up to eight alphanumeric characters. For example: Fall, Spring, Mar., Nov, Week 1, Week 2. You can define up to five terms. These labels appear on the packaging record entry screen, on lists, and on reports.
Enrollment Status	This field assigns a particular enrollment status for each term you define and cannot be left blank once you enter data for its corresponding term field. Use one of the two methods below to decide which enrollment status to select. Each method has a different effect on the packaging records created with this Academic Year Profile. System-Defined — You select the default enrollment status that is assigned to each packaging record with this profile. Valid default values include: • Full Time • 3/4 time • 1/2 time • < 1/2 time (less than 1/2 time) • Not Enrolled FAFSA-Defined — Imports student enrollment status responses on the FAFSA during the ISIR import process corresponding to the default value you select. Valid default values include: • Summer 2001 • Fall 2001 • Winter 2001-2002 • Spring 2002 • Summer 2002 You can change the default values pertaining to individual student records until the student records are packaged. The value in this field is primarily informational and doesn't impact the system at other levels, with the exception of Pell Grant calculations. Because enrollment status determines the Pell Grant calculation, you must remember to verify the default value for Pell-eligible students.
Percentages	These fields define the percentages of aid awarded from various programs to allocate to specific terms. Valid entries in the table are 00.00 to 100.00, and the sum of percentages for a given program across all terms in the Academic Year Profile cannot exceed 100%. For Pell Grants, the field defaults to AUTO if you selected Pell Grant Formula 1 or 2.

Setting Up Academic Year Profile: Instructor Demonstration

In this demonstration, we create an Academic Year Profile.

Step	Action
1	Select **Tools/Setup/ Packaging/Academic Year Profile** from the menu bar. The Academic Year Profile dialog box displays.
2	Click **Add** to create a new record.
3	First, enter the Code (up to 4 characters) to identify this record. In this case, enter **FS**.
4	Click the **Default** check box to indicate that this AYP record will be the Default Academic Year Profile.
5	A dialog box displays because for the purpose of this training a default profile has already been set up. Click **Yes** to change the default profile to FS. Click **OK** to confirm.
6	Type a descriptive Title. In this case, type **2001-2002 Fall/Spring Standard**.



Code: FS

Default: ☑

User Modified: PACK

Date Modified: 09/08/2001

Title: 2001-2002 FALL/SPRING STANDARD

Pell Grant Formula: 1 - Standard-term, credit-hour programs (30 weeks)

Program Proration Percent: 00.00

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

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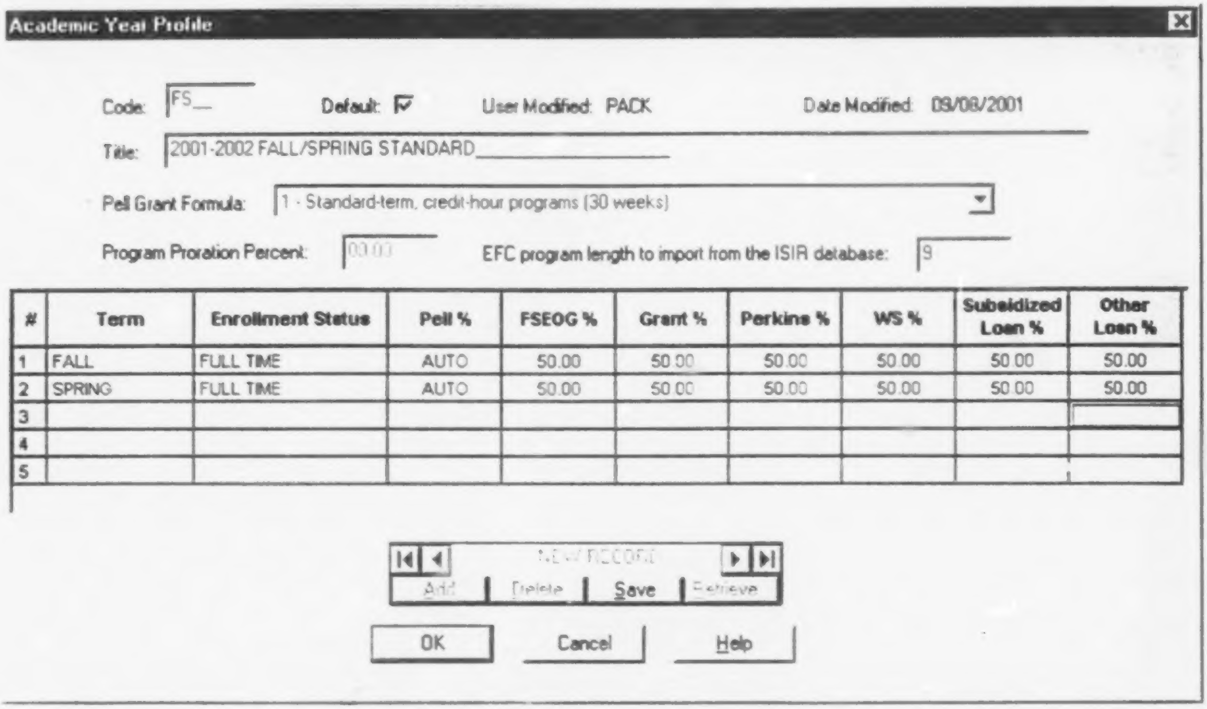
Setting Up Academic Year Profile: Instructor Demonstration (continued)

Step	Action
7	Click the down arrow and select the appropriate Pell Grant Formula. In this case, select **1 - Standard-term, Credit-hour programs (30 weeks).** For Pell Grant Formulas 2, 4, or 5, you must enter a Program Proration Percent (0-99.99). For Pell Grant Formulas 1, 2, or 6, the Program Proration Percent is automatically grayed out. This prevents you from entering data in that field.
8	Enter the correct number of months for the EFC Program Length to Import. The number you enter overrides the system default of 9. In this case, leave the default value of 9.
9	Enter the term title, enrollment status, and percentages for up to 5 terms using the data below.



Academic Year Profile

Code: FS

Default: ☑

User Modified: PACK

Date Modified: 09/08/2001

Title: 2001-2002 FALL/SPRING STANDARD

Pell Grant Formula: 1 - Standard-term, credit-hour programs (30 weeks)

Program Proration Percent: 00.00

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

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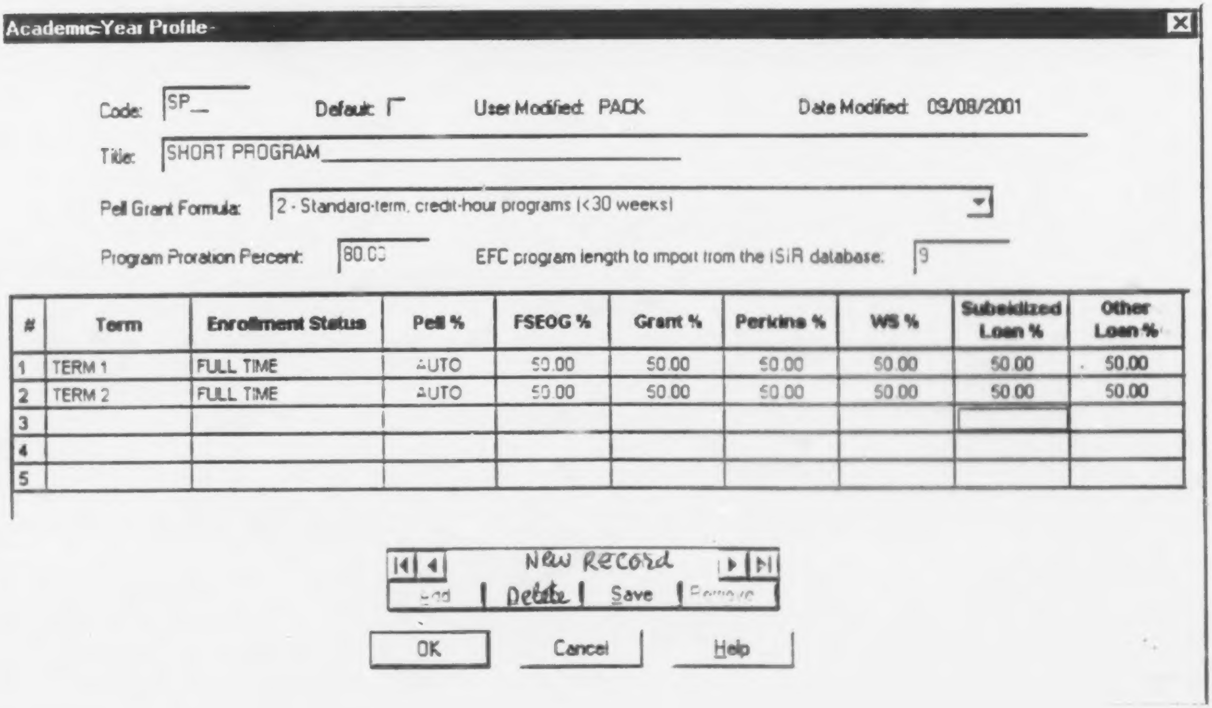
Setting Up Academic Year Profile: Instructor Demonstration (continued)

Step	Action
10	In this example, two terms have been set up—Fall and Spring. Funds are to be distributed equally between each of the two terms, so the percentage entered under each fund type for each term is 50%. Enrollment Status Field When packaging, the Pell Grant amount is calculated based on the value entered in the Enrollment Status field. The default enrollment status can be fixed at full-time, ¾ time, ½ time, or < ½ time. Every packaging record created under this AYP will be assigned this enrollment status. The other option is to tie the default enrollment status to whatever intended enrollment the student reported on the FASFA. For example, if you assign Fall 2001 as the default enrollment status for the Fall term, the system assigns the intended enrollment for Fall 2001 that the student reported on the FASFA. Note that the Default Enrollment Status for a particular student's record can be modified before the student is packaged. Percentages: The sum of the percentages allocated to all terms cannot exceed 100%. For Pell Grant Formulas 1 or 2, the system defaults to AUTO for Pell % and automatically allocates the Pell Grant amount evenly across the number of terms defined. For Pell Grant Formulas 3, 4, 5, or 6, enter a value in the Pell % field.
11	After entry is complete, click **Save** to save the record.
12	A Record Updates Saved dialog box displays. Click **OK**. Click Add if you need to enter additional AYPs. In this case, click **OK** to exit.

Other Examples of Academic Year Profile Records: Pell Grant Formula 2 (AYP Code SP)

This AYP record defines a standard term school with 24 weeks of instructional time. With Pell Grant formula 2, the system automatically allocates equal distributions of the Pell Grant between the terms. The Program Proration Percent equals 80% (24 weeks/30 weeks = 80%).



Code: SP
Default: ☐
User Modified: PACK
Date Modified: 09/08/2001
Title: SHORT PROGRAM
Pell Grant Formula: 2 - Standard-term, credit-hour programs (<30 weeks)
Program Proration Percent: 80.00
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	TERM 1	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	TERM 2	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

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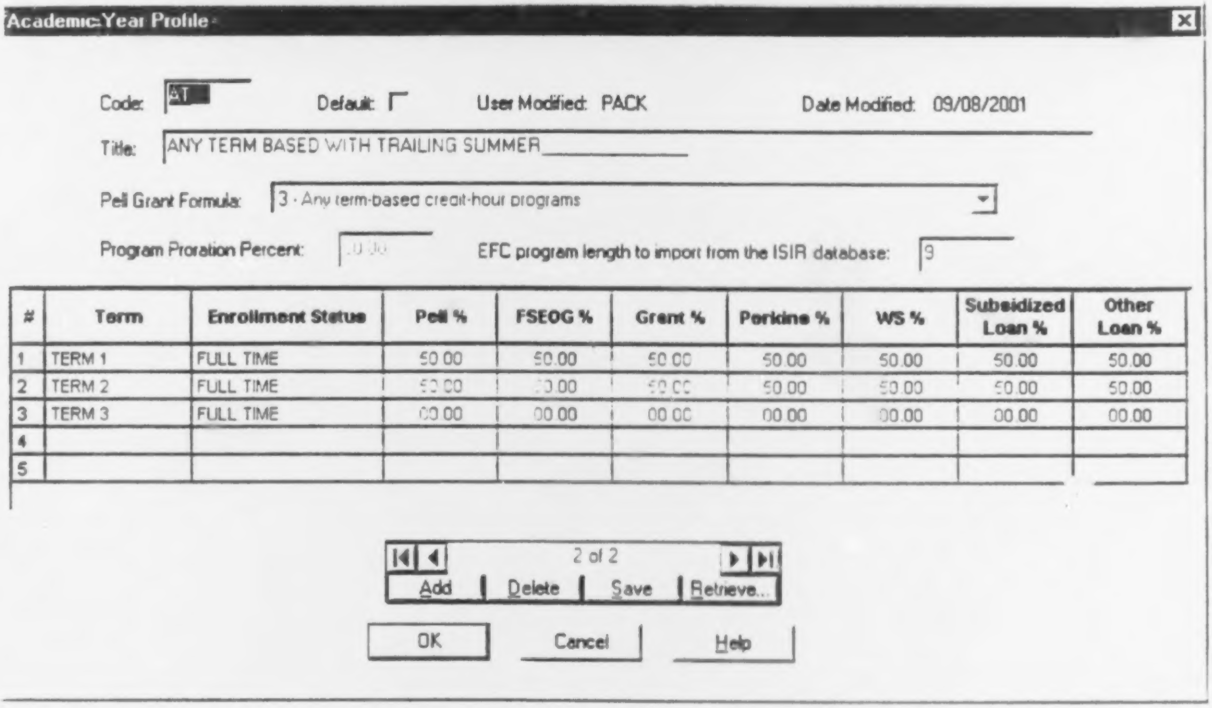
Other Examples of Academic Year Profile Records: Pell Grant Formula 3 (AYP Code AT)

This AYP record defines a school whose academic year includes a trailing summer term. Because the Pell Grant formula is 3, the Program Proration Percent defaults to 0.00.



Code: AT
Default: ☐
User Modified: PACK
Date Modified: 09/08/2001
Title: ANY TERM BASED WITH TRAILING SUMMER
Pell Grant Formula: 3 - Any term-based credit-hour programs
Program Proration Percent: 0.00
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	TERM 1	FULL TIME	50.00	50.00	50.00	50.00	50.00	50.00	50.00
2	TERM 2	FULL TIME	50.00	50.00	50.00	50.00	50.00	50.00	50.00
3	TERM 3	FULL TIME	00.00	00.00	00.00	00.00	00.00	00.00	00.00
4									
5									

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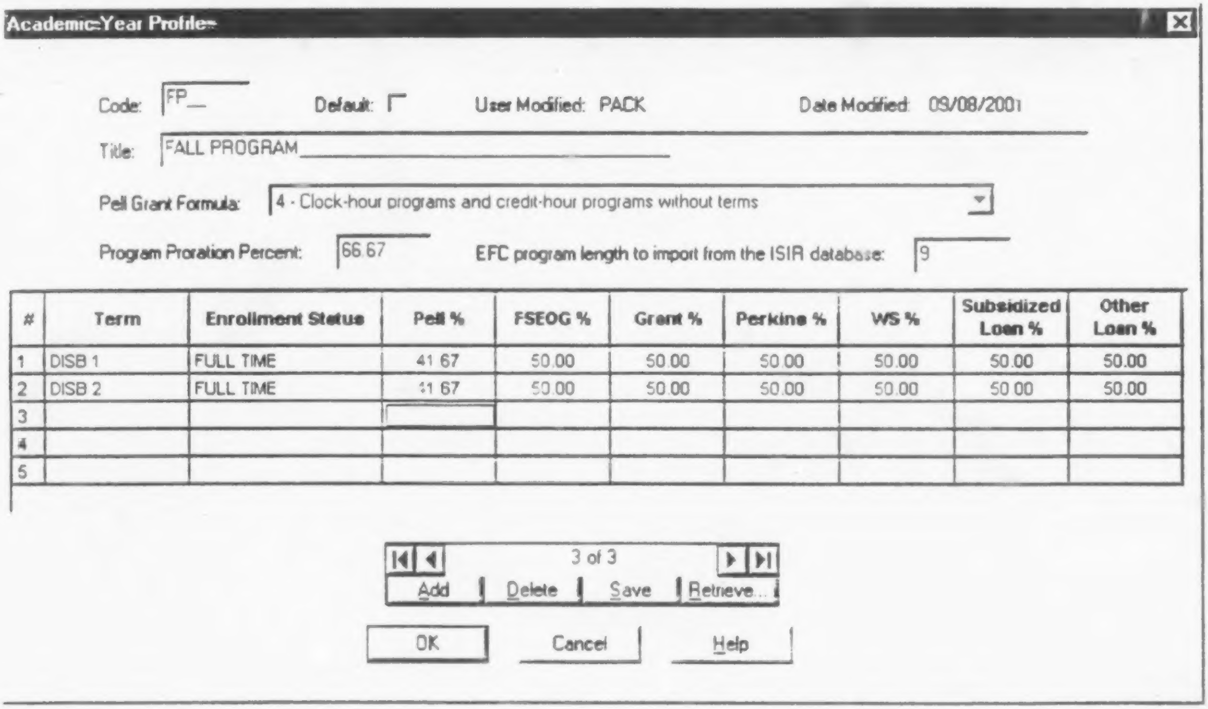
Other Examples of Academic Year Profile Records: Pell Grant Formula 4 (AYP Code FP)

This AYP record defines a 750-hour clock hour, 20 week program for a school that defines its academic year as 900 clock hours and 30 weeks.

Because Formula 4 is used, both the Program Proration Percent and the Pell % must be calculated and entered.



Code: FP

Default: ☐

User Modified: PACK

Date Modified: 09/08/2001

Title: FALL PROGRAM

Pell Grant Formula: 4 - Clock-hour programs and credit-hour programs without terms

Program Proration Percent: 66.67

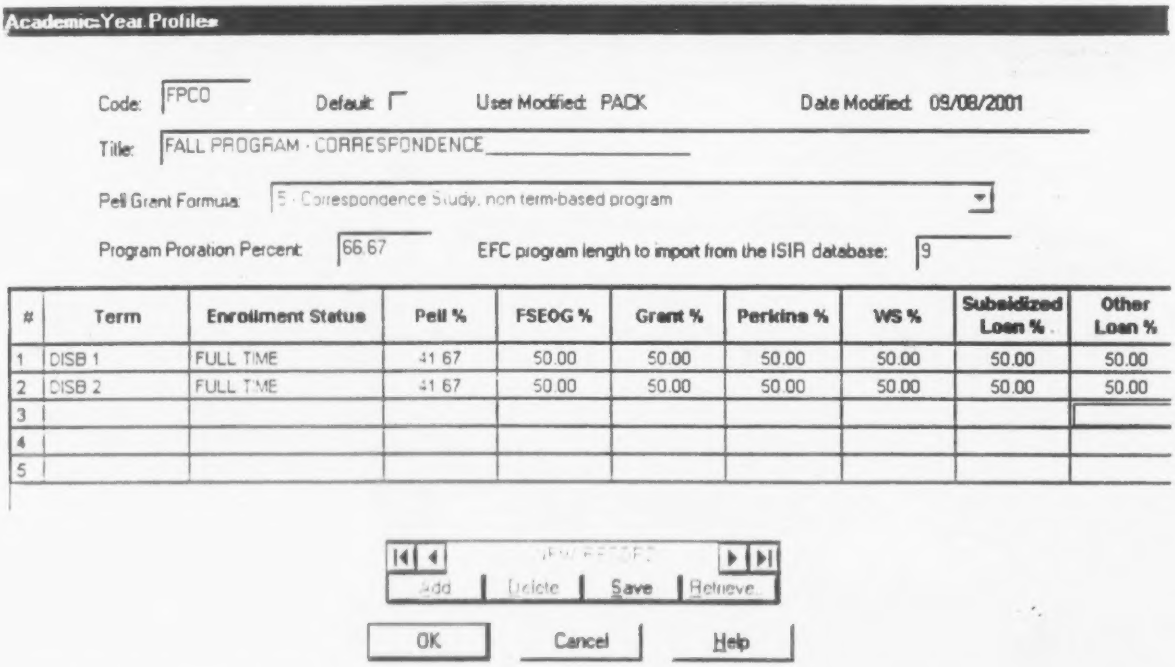
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	DISB 1	FULL TIME	41.67	50.00	50.00	50.00	50.00	50.00	50.00
2	DISB 2	FULL TIME	41.67	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

Other Examples of Academic Year Profile Records: Pell Grant Formula 5 (AYP Code FPCO)

This AYP record is similar to Pell Grant Formula 4, but is defined for a non term based correspondence program.

The Pell % is calculated as follows:
20 weeks/30 weeks = 66.67%
The Program Proration Percent is calculated as follows:
375 clock hours per term/900 clock hours =41.67%



Code: FPCO
Default: ☐
User Modified: PACK
Date Modified: 09/08/2001
Title: FALL PROGRAM - CORRESPONDENCE
Pell Grant Formula: 5 - Correspondence Study, non term-based program
Program Proration Percent: 66.67
EFC program length to import from the ISIR database: 9

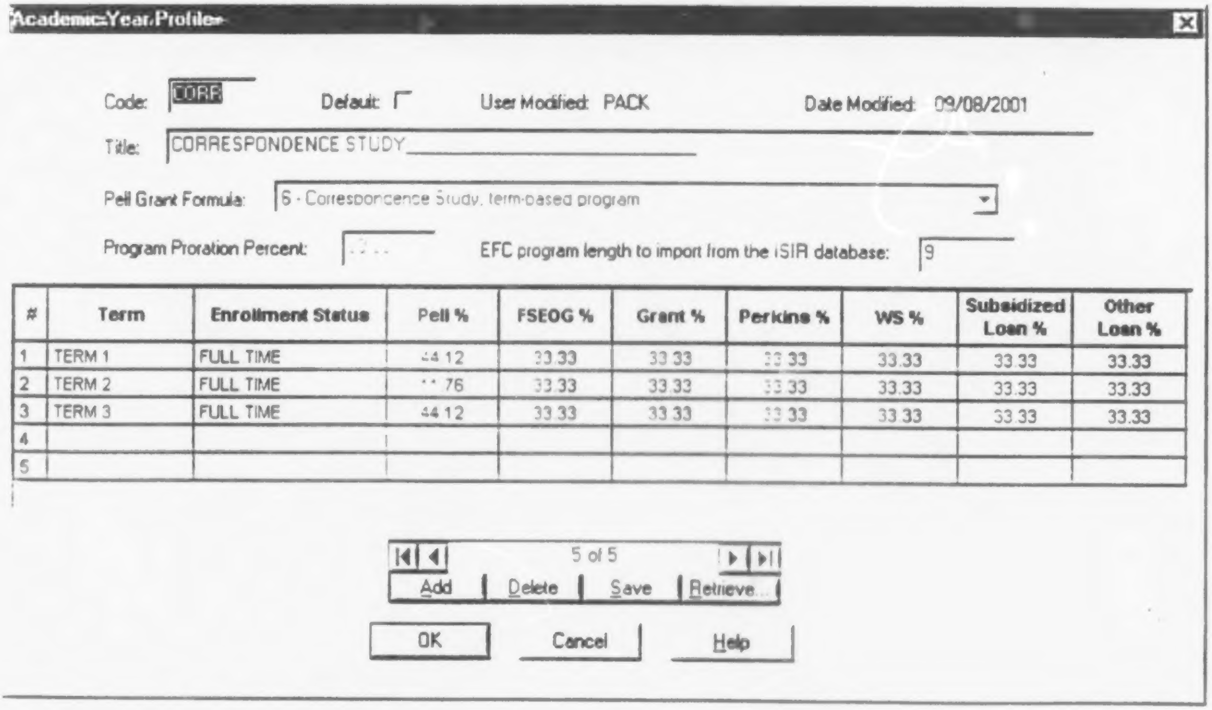
#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	DISB 1	FULL TIME	41.67	50.00	50.00	50.00	50.00	50.00	50.00
2	DISB 2	FULL TIME	41.67	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

Other Examples of Academic Year Profile Records: Pell Grant Formula 6 (AYP Code CORR)

This AYP record is similar to the Pell Grant Formula 3 record. It defines a correspondence study, term-based program.

The Pell % for each term is calculated based on the number of weeks in each term:

- Term 1: 15 weeks/34 weeks = 44.12%
- Term 2: 4 weeks/34 weeks = 11.76%
- Term 3: 15 weeks/34 weeks =44.12%



Code: CORR
Default: ☐
User Modified: PACK
Date Modified: 09/08/2001
Title: CORRESPONDENCE STUDY
Pell Grant Formula: 6 - Correspondence Study, term-based program
Program Proration Percent: [illegible]
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	TERM 1	FULL TIME	44.12	33.33	33.33	33.33	33.33	33.33	33.33
2	TERM 2	FULL TIME	11.76	33.33	33.33	33.33	33.33	33.33	33.33
3	TERM 3	FULL TIME	44.12	33.33	33.33	33.33	33.33	33.33	33.33
4									
5									

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Lesson 6 Exercise

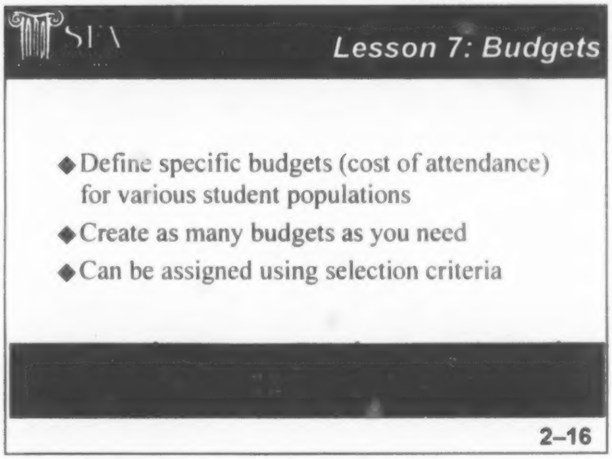
Instructions

Set up a default Academic Year Profile that would cover the most students at your school.

Review

True of False:

1. ________ Once a student record is packaged, the AYP code for that record cannot be changed.
2. ________ You can delete or change an AYP code as long as that profile has not been assigned to a student packaging record.
3. ________ You may designate more than one AYP record as the default record.
4. ________ You may create as many AYP records as you need.
5. ________ The percentages on the AYP record define what percentage of a student's award will be allocated to each term.



Lesson 7: Budgets

- Define specific budgets (cost of attendance) for various student populations
- Create as many budgets as you need
- Can be assigned using selection criteria

2–16

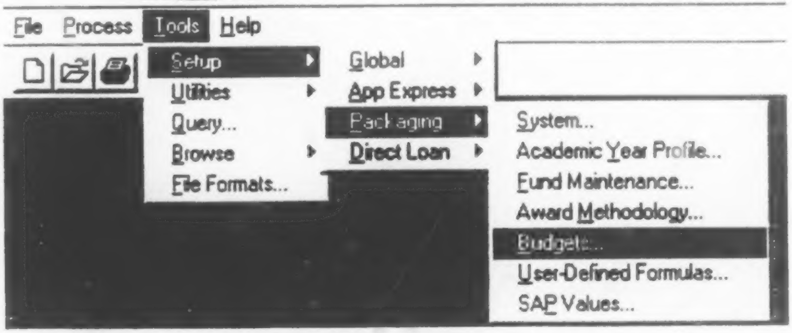
Lesson 7: Budgets

In Budgets setup, you define specific budgets (cost of attendance) for various student populations at your school. Then, using a query (created in the Packaging module) to identify a specific student population, you can electronically assign the corresponding budget to all members or subsets of the entire population in one step.

Before you enter data into the software, you must determine the criteria needed to identify the different populations. You might base your population criteria on a single variable, such as grade classification (undergraduate versus graduate), residency (in state versus out of state), housing status (on-campus versus off-campus), or on some combination of these variables.

You also need to determine what components to include in each budget you define for specific student populations. These budget components are those charges and allowances established by your school for attendance for the academic year. Generally, they include tuition and fees, allowances for room and board, books and supplies, an allowance for computer expenses, transportation and miscellaneous expenses, childcare, dependent care, and certain disability-related expenses.

To setup Budgets, select **Tools/Setup/Packaging/Budgets** from the menu bar.


File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values...

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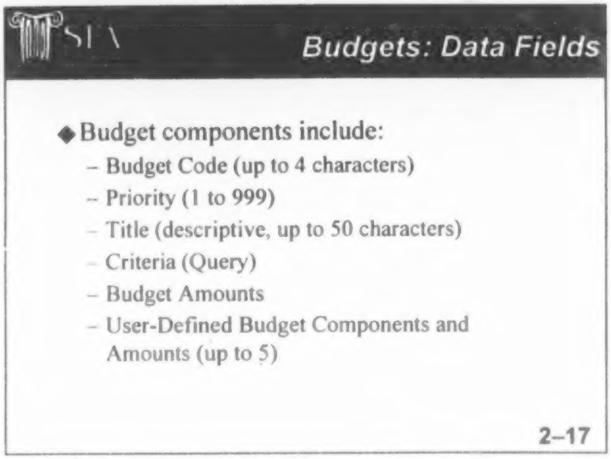


Budgets: Data Fields

◆ Budget components include:
- Budget Code (up to 4 characters)
- Priority (1 to 999)
- Title (descriptive, up to 50 characters)
- Criteria (Query)
- Budget Amounts
- User-Defined Budget Components and Amounts (up to 5)

2–17

Budgets: Data Fields

For each budget you create, you define:

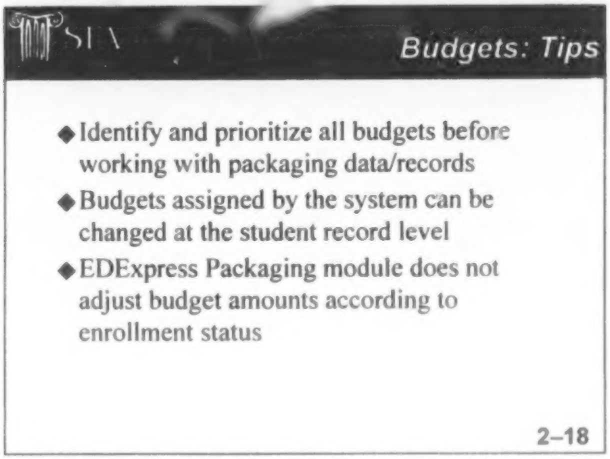
- Budget Code
- Priority
- Title
- Criteria
- Budget Amounts
- User-Defined Budget Amounts

A description of each data element is provided on the following page.

Budget Fields

Field	Description
Budget Code	**The unique code you select identifies the budget. This system-required code can consist of any combination of up to four alphanumeric characters. Both the budget code and the budget total appear on the student's packaging record. You cannot change the budget code once a student packaging record has been assigned to the corresponding budget.**
Priority	This required numeric field (1-999) indicates the order that the budget database is searched. The budget with priority 1 will be considered first, priority 2 next, etc. The first budget for which the student meets the selection criteria is assigned to the student's packaging record.
Title	This field is required, so enter a descriptive title for the budget. The title can consist of up to 50 valid keyboard characters, except the pipe symbol (|). When space is available, the title prints on reports and displays on screens. You cannot change the title once a student packaging record has been assigned to the corresponding budget.
Criteria	This optional field identifies a query you create in the Packaging module to specify which student population should be assigned this budget. The ellipsis button (…) displays the list of titles you created in the Query function. To establish a budget without using Selection Criteria, skip this field. If you change your mind, you can go back and update the field, as long as no student packaging records have been assigned to this budget.
Budget Amounts	This field includes the budget amount you assign to a standard budget component (tuition and fees, loan fees, room and board, books and supplies, and transportation) you want to include. Each of the five standard budget components has a corresponding budget amount field. In addition, a Miscellaneous field is available for you to include any items not described by the other categories. Valid amounts are 0 to 99999. Note that loan fees is a new standard budget field for 2001-2002.
User-Defined Budget Amounts	In addition to the standard budget components, you may include up to 5 more user-defined components and corresponding amounts. For example, you might define a budget component for special fees or for computer expenses. For each component, you must enter a distinct title (up to 25 alphanumeric characters) and an amount (0 to 99999).

New!



Budgets: Tips

- ◆ Identify and prioritize all budgets before working with packaging data/records
- ◆ Budgets assigned by the system can be changed at the student record level
- ◆ EDExpress Packaging module does not adjust budget amounts according to enrollment status

2–18

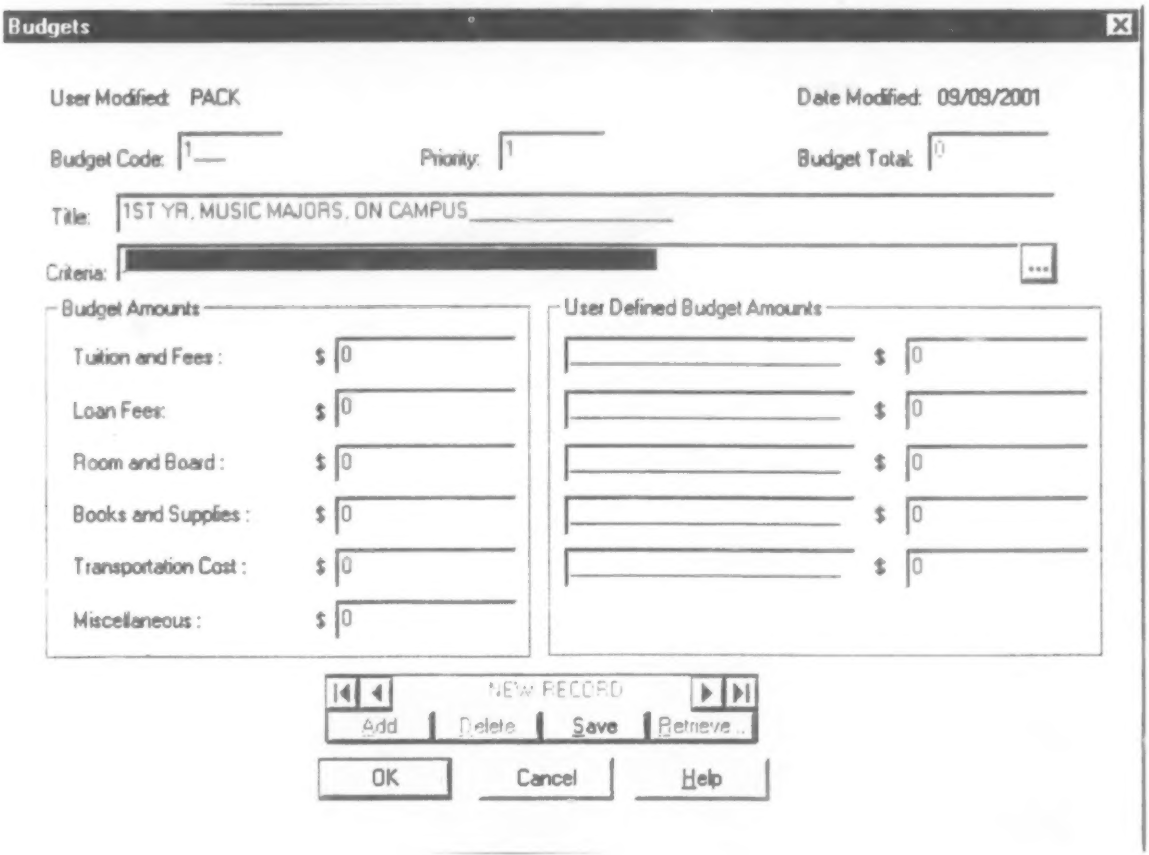
Budgets: Tips

- Create as many budgets as needed for your student populations, and prioritize budgets as they apply from the most specific to the most general student populations.
- Group budgets by category. Then, assign a range of budget priority numbers larger than the number of budgets in the category. If you need to add/insert more budgets, you will not have to resequence the priority numbers of existing budgets.
- When importing ISIR data into the Packaging database to create student packaging records, you can have EDExpress automatically allocate budgets based on the criteria (queries) and priority numbers assigned to each budget. However, if working with a large ISIR file, a quicker method is the Process/Add Budget function.
- If you set up only one budget in the database, that budget becomes the default for all student packaging records created.
- At the student packaging record level, you can override the default budget assigned and make changes at any time, even after the student record has been packaged. You also can modify the amounts of each component of a student's budget at any time. However, once a particular budget has been assigned to a packaging record, you no longer can modify that budget in Setup.
- Packaging in EDExpress does not automatically adjust budgets for different enrollment statuses. If budget amounts need to be adjusted for a group of students, create a query that identifies students with a certain enrollment status and use the multiple entry feature of the Packaging Module to assign the correct budget code to those students. Or use multiple entry to enter a group of individual Social Security Numbers for student records that should be assigned the same budget code.
- If you have already packaged students and one of your budgets changes, you will need to manually assign the budget to student records.

Setting Up Budgets: Instructor Demonstration

In this demonstration, we create a budget for first-year, music majors who live on campus.

Step	Action
1	Select **Tools/Setup/ Packaging/Budgets** from the menu bar. The Budgets dialog box displays.
2	Click **Add**. Then, enter up to 4 alphanumeric characters for the Budget Code, the unique identifier for the budget record. In this case, enter **1**.
3	Enter the Priority Code. In this case, enter **1**. Priority 1 indicates the highest priority; priority 999 would indicate the lowest.
4	Enter a descriptive Title (up to 50 characters) to identify the students who receive this budget. In this case, type: **1st Yr, Music Majors, On Campus.**



User Modified: PACK

Date Modified: 09/09/2001

Budget Code: 1

Priority: 1

Budget Total: 0

Title: 1ST YR, MUSIC MAJORS, ON CAMPUS

Criteria: [redacted]

Budget Amounts

Tuition and Fees : $ 0

Loan Fees: $ 0

Room and Board : $ 0

Books and Supplies : $ 0

Transportation Cost : $ 0

Miscellaneous : $ 0

User Defined Budget Amounts

$ 0

$ 0

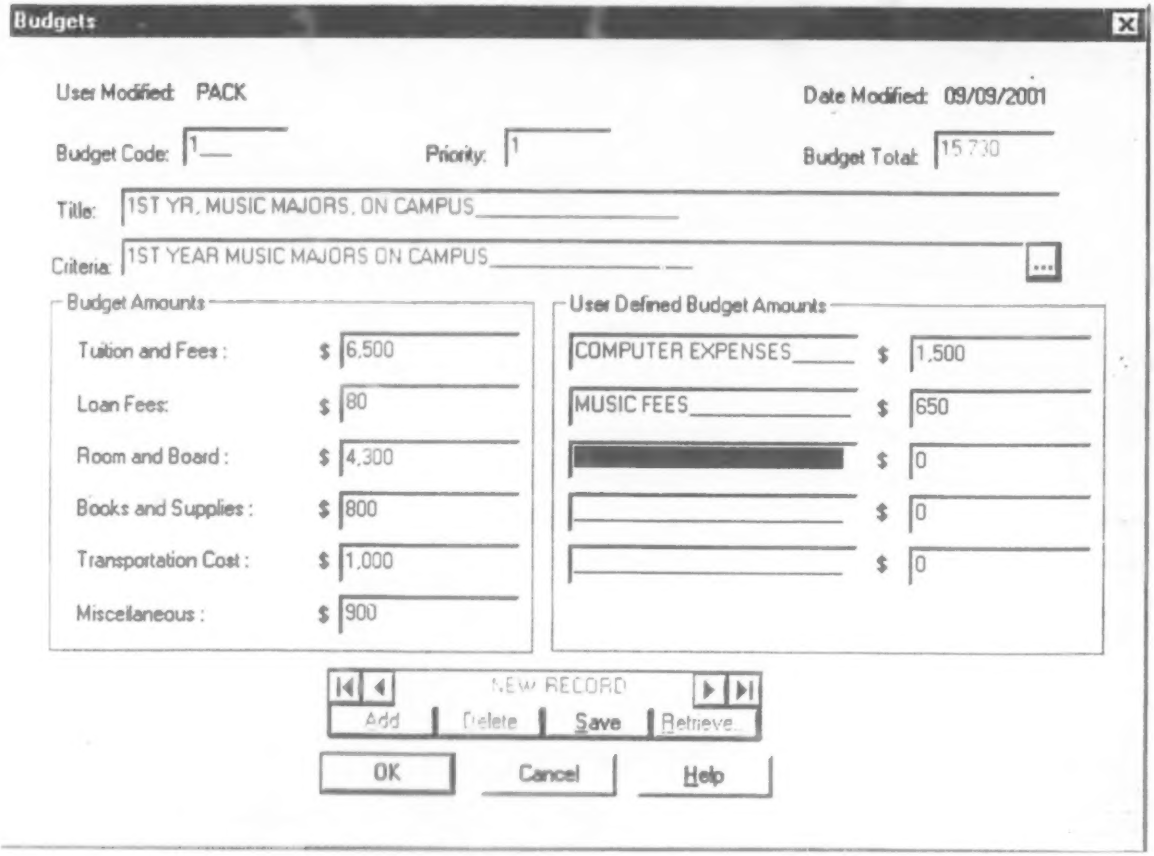
$ 0

$ 0

$ 0

Setting Up Budgets: Instructor Demonstration (continued)

Step	Action
5	Select **Criteria** to specify students for this budget. Either enter the query name or click the ellipsis button next to the field.
6	In this case, click the **ellipsis button**. The Query Database dialog box displays.
7	Select the query you want by clicking on the Title. In this case, select **1st Year Music Majors On Campus**.
8	Click **OK**. The title of the query displays in the Criteria field.
9	Enter the Budget Amount that corresponds to each component as shown below. If User-defined Budget Amounts are included, enter a title and amount for each user-defined component.
10	Click the **Save** button. Click **OK** to confirm, and then **OK** again to exit.



User Modified: PACK

Date Modified: 09/09/2001

Budget Code: 1

Priority: 1

Budget Total: 15,730

Title: 1ST YR. MUSIC MAJORS, ON CAMPUS

Criteria: 1ST YEAR MUSIC MAJORS ON CAMPUS

Budget Amounts

Tuition and Fees :	$ 6,500
Loan Fees:	$ 80
Room and Board :	$ 4,300
Books and Supplies :	$ 800
Transportation Cost :	$ 1,000
Miscellaneous :	$ 900

User Defined Budget Amounts

COMPUTER EXPENSES	$ 1,500
MUSIC FEES	$ 650
	$ 0
	$ 0
	$ 0

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Lesson 7 Exercise

Instructions

Enter one budget record for a student population on your own campus that will be packaged. Consider the following:

- Academic Year Profile
- Tuition
- Housing
- Special Fees
- Priority (general population versus specific population)
- Is a query needed to identify the student population associated with the particular budget?

Review

True of False:

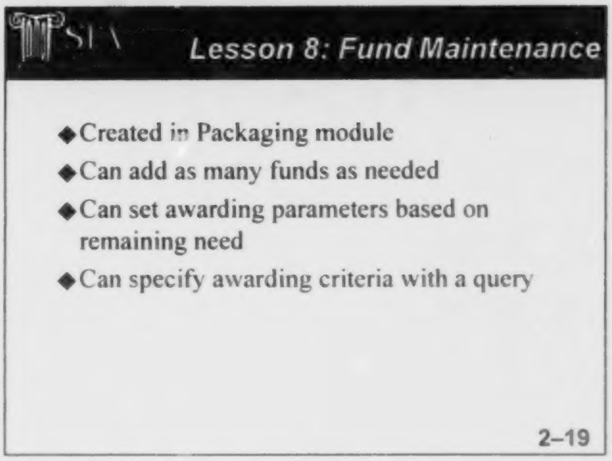
1. ________ You should assign priority 1 to the budget that will apply to the most students and priority 999 to the budget that would apply to the fewest.

2. ________ When you import ISIR data into the Packaging module, EDExpress automatically assigns budgets to the student records based on the criteria (queries) and priority numbers you have established.

3. ________ After a budget has been assigned to a student, you cannot go into the student's record and modify any of the budget amounts.

4. ________ You are required to enter a criteria (query) for each budget record.

5. ________ Once a particular budget has been assigned to a student's packaging record, you cannot modify that budget record in Setup.



Lesson 8: Fund Maintenance

- Created in Packaging module
- Can add as many funds as needed
- Can set awarding parameters based on remaining need
- Can specify awarding criteria with a query

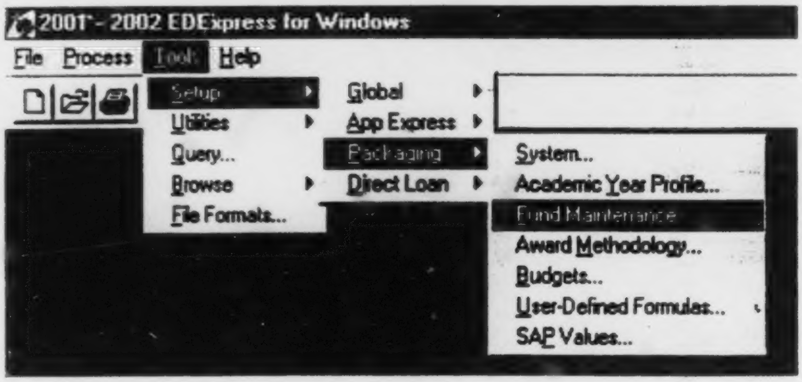
2–19

Lesson 8: Fund Maintenance

Using the Fund Maintenance function, you create and maintain aid sources (or funds) needed for packaging students. You also can access instant information about total amounts awarded as well as amounts remaining.

Each fund you create represents a separate financial aid resource. You can add as many funds as needed. In addition to funds for federal student aid programs, you can create funds for institutional, state, and outside programs. For some funds you can also set awarding parameters based on remaining need. Also, you can specify which students should receive awards from the fund being set up or maintained by using a query.

To set up Budgets, select **Tools/Setup/Packaging/Fund Maintenance** from the menu bar.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
System...
Academic Year Profile...
Fund Maintenance
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values...

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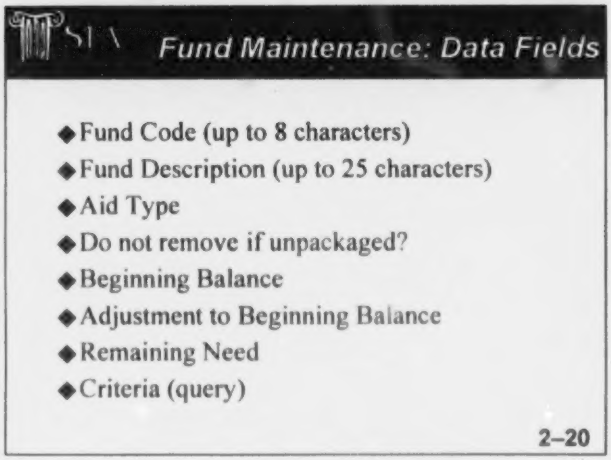


Fund Maintenance: Data Fields

- ◆Fund Code (up to 8 characters)
- ◆Fund Description (up to 25 characters)
- ◆Aid Type
- ◆Do not remove if unpackaged?
- ◆Beginning Balance
- ◆Adjustment to Beginning Balance
- ◆Remaining Need
- ◆Criteria (query)

2–20

Fund Maintenance: Data Fields

For each fund you set up, you need to make decisions about the following fund components and enter the information into the software:

- Fund Code
- Fund Description
- Aid Type
- Do not remove if unpackaged?
- Beginning Balance
- Adjustment to Beginning Balance
- Remaining Need
- Criteria

A description of each data element is provided on the following page.

Fund Maintenance Fields

Field	Description
Fund Code	For each fund you set up, a Fund Code is required and this field cannot be blank. Each fund has a unique code, up to eight alphanumeric characters long. Be sure to assign a code that readily identifies the fund. In most instances, this will be the only fund identifier you see. Unless you are adding a new code, the field is display only. You cannot modify a fund code after you have added or saved the fund to the database.
Fund Description	Each fund also requires a corresponding Fund Description, up to 25 alphanumeric characters long. This field cannot be left blank.
Aid Type	This field identifies the aid category of the fund and cannot be blank. Refer to the following page for a complete listing of aid types. The Aid Type field impacts how the fund is packaged. Note that Aid Type codes D, E, F, K, P, S, W, and U cannot be assigned to more than one fund.
New! Do not remove if unpackaged	This new field for 2001-2002 allows you to run the unpackage process without removing specific awarded funds.
Beginning Balance	The value in the Beginning Balance field is the initial amount authorized to award from this fund for the upcoming year. This field cannot be blank. Valid balance amounts are 00000000 to 99999999. Once the fund record is saved, you cannot change the value entered in this field. To make changes, your options are to delete the fund (only if no packaging records have been awarded from it) and start over or to enter a value in the Adjustment to Beginning Value field.
Adjustment to Beginning Balance	The Adjustment to Beginning Balance field contains the running total of adjustments that may need to be made to the fund's Beginning Balance. Adjustments could be due to changes in authorizations, refunds, matches, etc. Valid amounts are 00000000 to 99999999 and can have a negative value. Generally, when the fund is set up the value entered will be 0, since the field cannot be blank
Remaining Need	This feature allows you to package specific amounts of a fund at different levels of remaining need. For example, after awarding Stafford loans (Sub/Unsubsidized), you can designate how much of an institutional need-based scholarship to award based on the student's remaining need. So, if there is still at least \$2,500 or greater remaining need, you can tell the software to award \$500; if at least \$2,000 to \$2,499, award \$300; if between \$500 and \$1,999, award \$150; etc. You can designate up to 6 levels of remaining need and corresponding award amounts. However, this feature pertains only to Aid Type codes D, E, G, K, L, N, R, S, U, P, W, and Y. Aid type codes F, O, and V are excluded.
Criteria	This optional feature, based on a defined query, allows you to specify which students should receive awards from the fund being setup or maintained. The ellipsis (...) button displays the list of defined queries from which you can select a query to tie to the fund.

Aid Types

Aid Type	Can Apply to More than One Fund Code	Fund	Description
D*	No	Federal Unsubsidized Loan - Need based	Self-help. In the packaging process an award amount from the fund with this aid type is subject to statutory annual loan limit amounts based on the student's eligibility.
E	No	Federal Supplemental Educational Opportunity (FSEOG)	Gift aid.
F	No	Federal Pell Grant	Gift aid. Awarded based on the Pell Grant Formula setup in the AYP.
G	Yes	Need-based Grant	Gift aid. Use for any need-based grant or scholarship, other than Pell or FSEOG.
K	No	Perkins Loan	Self-help.
L	Yes	Other Need-Based Loan	Self-help. In the packaging process, award amounts from this fund are limited to need.
N	Yes	Non-Need Based Loan	Self-help. Award amounts from this fund cannot exceed the budget amount, less other resources.
O	Yes	Outside Resource	Outside Resource Gift aid or Self-help. Identifies a fund for which you enter an award decision made "outside" the system. Although the fund is considered a resource in the packaging process, it cannot be automatically packaged by the system. Awards from this fund type should be added manually.
P	No	PLUS (Parent Loan)	Self-help. Award amounts from this fund cannot exceed the budget amount, less other resources.
R*	Yes	Non-Need Based Grant	Gift aid. Use for any non-need based grant or scholarship.
S	No	Federal Subsidized Loan	Self-help. In the packaging process an award amount from the fund with this aid type is subject to statutory annual loan limit amounts based on the student's eligibility.
U	No	Federal Unsubsidized Loan – Non-need based	Self-help. In the packaging process an award amount from the fund with this aid type is subject to statutory annual loan limit amounts based on the student's eligibility.
V*	Yes	Chapter 30 VA Benefits/Americorps	Chapter 30 VA and Americorps Benefits
W	No	Federal Work-Study	Self-help.
Y	Yes	Other Work-Study	Self-help.

* These Aid Types are new for 2001-2002.

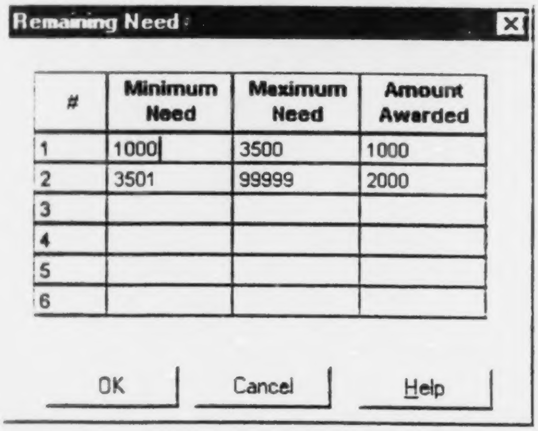
Setting Up Fund Maintenance: Instructor Demonstration

In this demonstration, we create a record for the FSEOG fund.

Step	Action
1	Select **Tools/Setup/ Packaging/Fund Maintenance** from the menu bar. The Fund Maintenance dialog box displays.
2	If this is the first record in the database, just begin by entering a descriptive Fund Code (up to 8 characters). In this case, records exist, so click **Add.** Enter **FSEOG** as the Fund Code.
3	Enter the Fund Description (up to 25 characters). In this case, type **Federal SEOG.**
4	Select the appropriate Aid Type from the drop-down list. In this case, select **E** for FSEOG. Remember that certain aid types, such as Aid Type E, can only be used once.
5	Mark the field Do not remove if unpackaged? if you want EDExpress to keep this fund from being removed during the unpackage process. In this case, leave this item unmarked.
6	The Criteria field is an optional field in Fund Maintenance setup. It allows you to limit the population of those who receive this fund. In this case, we will limit the fund to undergraduates with an EFC less than 1000. Click the **ellipsis button**.
7	A list of available queries displays. Select **Undergraduates With EFC Less Than 1000** and click **OK.**
8	The query title displays. In the Beginning Balance field, enter the amount available to award from this fund. In this case, enter **275000**.

Setting Up Fund Maintenance: Instructor Demonstration (continued)

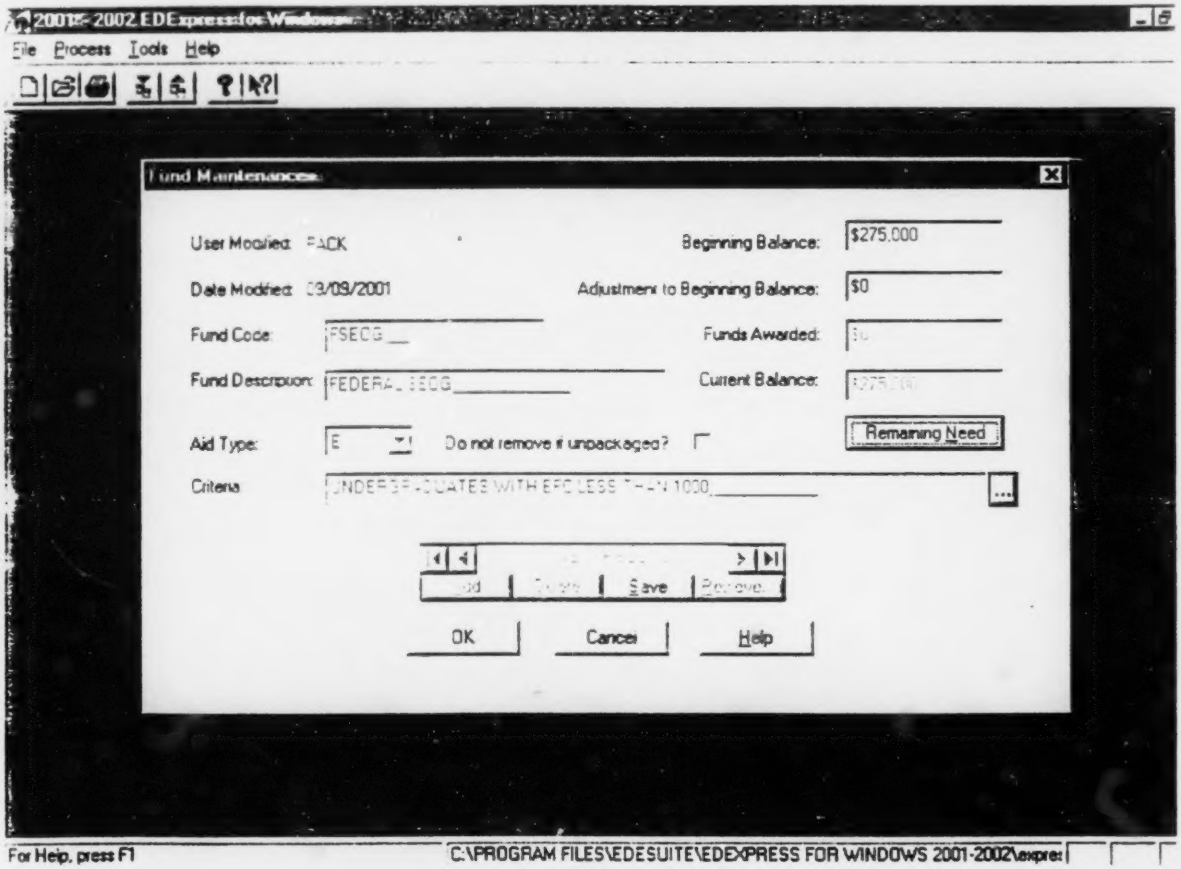
Step	Action
9	Press the **Tab key** to move to the next field. Note that the Current Balance field automatically updates. Once the fund record is saved, you cannot update the value in the Beginning Balance field. If the amount available to award changes, adjustments must be entered in the Adjustment to Beginning Balance field. If you want the system to package an amount based on remaining need (after Stafford loans), click the Remaining Need button and enter the values. Note that beginning in 2001-2002 this feature is available for all loan types. In this case, click the **Remaining Need** button.
10	The Remaining Need dialog box displays. Enter the figures for remaining need. In this case, we want to award a $1,000 FSEOG to undergraduate students who have a remaining need between $1,000 and $3,500, and $2,000 to those with a remaining need higher than $3,500. Click **OK** to return to the Fund Maintenance dialog box.



#	Minimum Need	Maximum Need	Amount Awarded
1	1000	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

Setting Up Fund Maintenance: Instructor Demonstration (continued)

Step	Action
11	To save the new FSEOG record, click **Save**.
12	A Record Updates Saved dialog box displays. Click **OK**.
13	Click Add if you want to continue entering funds. In this case, click **OK** to exit.


2001-2002 EDExpress for Windows
File
Process
Tools
Help
Fund Maintenance
Remaining Need
Add
Delete
Save
Remove
OK
Cancel
Help

User Modified: PACK
Date Modified: 03/09/2001
Fund Code: FSEOG
Fund Description: FEDERAL SEOG
Aid Type: E
Do not remove if unpackaged? ☐
Criteria: UNDERGRADUATES WITH EFC LESS THAN 1000
Beginning Balance: $275,000
Adjustment to Beginning Balance: $0
Funds Awarded: $0
Current Balance: $275,000

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

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Lesson 8 Exercise

Instructions

Enter at least three fund records for funds that you award at your school.

Review

True of False:

1. ________ Use aid type K for Perkins Loan.
2. ________ A student record may be awarded the same fund more than once.
3. ________ You can setup Fund Maintenance to only award Perkins Loans to undergraduates reporting an Adjusted Gross Income of less than $20,000.
4. ________ You can setup Fund Maintenance to award $3,000 in Federal Work-Study to all students with a remaining need of greater than $6,000.
5. ________ Use Aid Type G for Federal Pell Grant.

Lesson 9: Award Methodology

- Created in Packaging module to determine which students will receive certain funds, along with amounts and priority in which funds will be awarded
- Can create up to 999 award methodologies
- Based on remaining need
- May be tied to a query

2–21

Lesson 9: Award Methodology

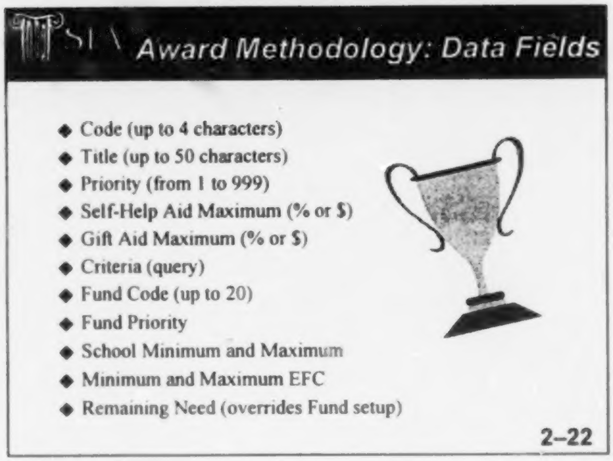
An award methodology is a systematic method for determining which student or group of students will receive certain funds, the amounts of those funds, and the priority in which those funds will be awarded. The basic function of award methodologies within EDExpress Packaging is to have the system automatically package aid based on the student's need.

Award methodologies fuel the Packaging system. To set up any efficiently run packaging system, you must carefully plan out your awarding strategy before you begin to package students. Then, transfer this strategy to the award methodologies you'll create in the software. These methodologies can be very simple, or they can be very complex.

As you develop your award methodologies, keep in mind the basic awarding rules of the EDExpress Packaging system. The most important rule is that award methodologies package aid taking into account student budgets and unmet need. Regardless of the various parameters you define, including aid type, the system won't package aid in excess of cost of attendance.

Nor will it package in excess of need, with the exception of unsubsidized and PLUS loans. Therefore, before you begin setting up award methodologies, you must devise a strategy on how you'll handle non-need based awards and students with no need, including those who won't file the FAFSA.

EDExpress gives you the ability to create up to 999 methodologies. Each has a unique code and priority. And each may be tied to a query created in the Packaging module to specify which students should receive the funds.



Award Methodology: Data Fields

- Code (up to 4 characters)
- Title (up to 50 characters)
- Priority (from 1 to 999)
- Self-Help Aid Maximum (% or $)
- Gift Aid Maximum (% or $)
- Criteria (query)
- Fund Code (up to 20)
- Fund Priority
- School Minimum and Maximum
- Minimum and Maximum EFC
- Remaining Need (overrides Fund setup)

2–22

Award Methodology: Data Fields

For each methodology created, you must consider the following data fields:

- Code
- Title
- Priority
- Self-Help Aid Maximum (percentage or dollar amount)
- Gift Aid Maximum (percentage or dollar amount)
- Criteria (Query)
- Fund Code
- Fund Priority
- School Minimum
- School Maximum
- Minimum EFC
- Maximum EFC
- Remaining Need

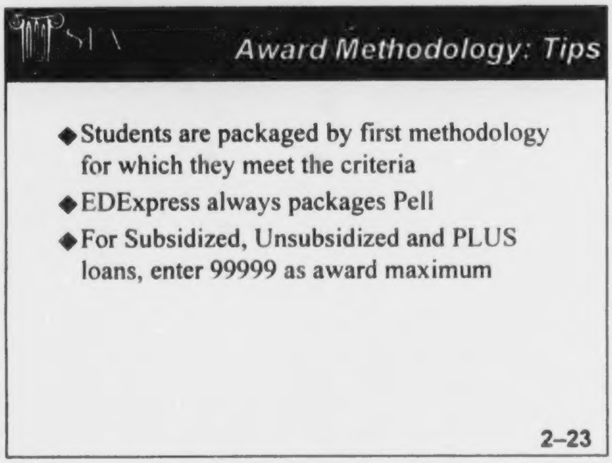
A description of each data element is provided on the following pages.

Award Methodology Fields

Field	Description
Code	The unique four-character code you select identifies the methodology. The code can consist of any combination of alphanumeric characters. The code cannot be changed after the award methodology record has been added to the database.
Title	The title, or the description of the award methodology, should identify the students who will be packaged. For example, In-State Freshmen, Independent Upperclassmen, etc. When space is available, the title prints on reports and displays on screens. It can consist of any valid keyboard character, except the pipe symbol (|).
Priority	This required numeric field (001-999) indicates the order that the methodology database is searched. The first methodology with which the student meets the selection criteria will be used to package that student.
Self-Help and Gift Aid Maximums	You must tell the system how to calculate the maximum amounts of both self-help aid and gift aid that can be awarded to satisfy unmet need. These maximums are based either on percentages *or* on dollar amounts. Then, depending on your preference, you enter either a maximum percentage or a maximum dollar amount. Valid percentages are 0 to 100, while valid dollar amounts are 0 to 99999.
Criteria	This field gives you the option of using selection criteria (or a query) to determine the methodology applied to a given record. Click the ellipsis (...) button to display a list of titles created from the Query function. You may want to establish one methodology that uses no selection criteria to ensure that every student can be packaged. Remember: the priority code determines which methodology will be used for packaging. So, you should assign higher priority numbers to methodologies not based on specific criteria. Note that this field is optional.
Fund Code	Fund codes specify what funds will be packaged using the award methodology. They are required. These codes are the ones you created in the Fund Maintenance setup. You can enter up to 20 unique fund codes for each award methodology. Individual fund codes can be used in more than one award methodology, and they can be used more than once within the same methodology. An award methodology's fund codes can be updated, as long as no students have been packaged using the funds. Also, because eligible recipients automatically receive Pell Grant funds, the Pell fund code doesn't need to be tied to an award methodology.
Fund Priority	This is the order in which the individual funds you tie to a specific award methodology are awarded. Each fund included in an award methodology must be assigned a unique fund priority number (from 1-20).

Award Methodology Fields (continued)

Field	Description
School Minimum and Maximum	For each fund identified in the award methodology, you can define the minimum and maximum amounts to be awarded for this particular fund within this award methodology. Valid amounts are 00000 to 99999. Both fields default to zero.
Minimum and Maximum EFCs	You also can specify the minimum and maximum EFCs allowed for the funds to be packaged using this award methodology. Valid amounts are 00000 to 99999. The system defaults to a value of 00000 for the minimum EFC and to 99999 for the maximum EFC.
Remaining Need	The Award Methodology setup displays a Remaining Need column. Amounts of remaining need previously tied to funds are displayed when you click on the Values button, allowing you to update the amounts. Even if you didn't define remaining need for a particular fund when you set up the fund, you can do so when setting up the award methodology. **Note that the values for remaining need entered under the Award Methodology setup take precedence over those entered under the Fund Maintenance setup.**



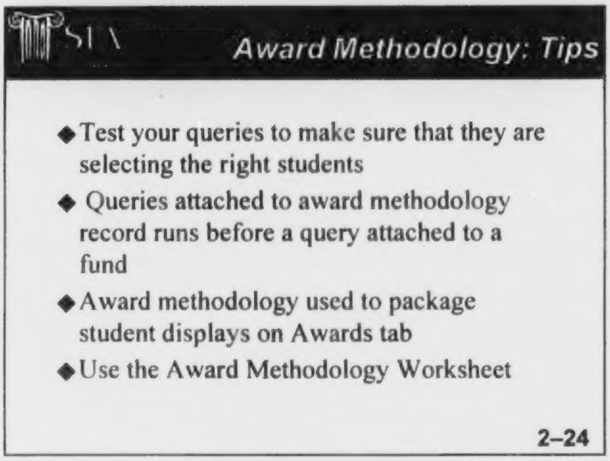
Award Methodology: Tips

- Students are packaged by first methodology for which they meet the criteria
- EDExpress always packages Pell
- For Subsidized, Unsubsidized and PLUS loans, enter 99999 as award maximum

2–23

Award Methodology: Tips

- To electronically package any fund, the fund must be tied to an award methodology.
- Group award methodologies together by category. Then, assign a range of award methodology priority numbers larger than the number of methodologies in the category. If you need to add/insert more methodologies, you will not have to resequence the priority numbers of the existing methodologies.
- Students are electronically packaged on the basis of only one award methodology. Methodologies are considered in priority order (where 001 is the highest priority and 999 is the lowest). A student will be assigned to the first methodology for which they meet the criteria.
- Once the award methodology has been saved, be very careful about making changes. If you need to remove a fund code from an award methodology, highlight the fund code and press the enter key. Or you can delete the award methodology record and start over.
- You cannot delete an award methodology that has been used to package students.
- Pell Grant awards are not restricted/considered when self-help and gift aid maximum amounts are invoked.
- Even if no award methodology is created, the system will always package Pell-eligible students. On the other hand, if methodologies do exist and these students aren't selected by any award methodology, they will be packaged only with Pell.
- For Subsidized, Unsubsidized and PLUS Loans, enter 99999 as the maximum award amount so that the system will correctly invoke statutory loan limits.
- Don't include Pell when creating your award methodology. The software will automatically calculate Pell awards when packaging students.



Award Methodology: Tips

- ◆ Test your queries to make sure that they are selecting the right students
- ◆ Queries attached to award methodology record runs before a query attached to a fund
- ◆ Award methodology used to package student displays on Awards tab
- ◆ Use the Award Methodology Worksheet

2–24

Award Methodology: Tips (continued)

- After completing all of your setups, you should review the queries tied to both Award Methodology and Fund Maintenance to be sure the queries are selecting students who meet your criteria. For your first packaging efforts, you might want to work with a smaller population or test group of students.
- A query attached to an award methodology runs before a query attached to a fund defined in the award methodology. If you want to include queries at both levels, the query attached to the award methodology should be very general to include a wider population, while the one attached to the fund can be more specific.

  For example, a particular award methodology has a query that selects undergraduate students (general) and includes a fund for a state grant. The query attached to the fund selects undergraduate students who are residents of that particular state (more specific).
- After the packaging process runs, the award methodology used to package the student is displayed in the Award Methodology field on the Awards tab. For those students not meeting criteria of any of the award methodologies, the Award Methodology field is left blank.
- Before entering data in the Award Methodology setup, you should complete an Award Methodology Worksheet for each of your methodologies. This tool will assist you in getting organized and planning your packaging strategy. A blank worksheet is provided in Appendix A.

Setting Up Award Methodology: Instructor Demonstration

In this demonstration, we create an award methodology record for undergraduates.

Step	Action
1	Select **Tools/Setup/ Packaging/Award Methodology** from the menu bar. The Award Methodology dialog box displays.
2	Click **Add** because other records have been entered in the database for the purposes of this training. (If this had been the first record in the database, you would just begin by entering a descriptive code of up to 4 characters.) Enter **UG** as the Code.
3	Enter a free-form Title that identifies students to be packaged using this methodology. When space is available, the Title prints on reports and displays on screens. In this case, enter **Undergraduates.**
4	Enter the **Priority Code**. The priority field indicates the order in which the methodology database is searched. The first Award Methodology that matches a student's attributes is used to package that student. Valid priority codes are 1 to 999 In this case, enter **1**.
5	You can set limits for the amounts of self-help and gift aid that can be packaged to satisfy unmet need. You must impose these limits using either percentages or dollar amounts. Note that the method you choose will be applied to both self-help and gift aid. Self-help aid consists of loans and work, while gift aid consists of grants. The system makes the distinction between self-help and gift aid according to the aid types assigned to funds. The system automatically defaults to Use Percentages. Because this example uses percentages to limit the amount of self-help and gift aid that can be packaged, keep the default value.

Examples of How EDExpress Treats Self-Help and Gift Aid Maximum Percentages and Amounts

Example #1: Percentages

In this example, self-help aid is limited to 40%, and gift aid is limited to 50% (Note that Pell is applied as gift aid).

COA = $8,000	EFC = 2200	Unmet Need = $5,800
Gift Aid limited @ 50%		$5,800 X 50% = $2,900
Self-Help Aid limited @ 40%		$5,800 X 40% = $2,320

Award Methodology Funds	Fund Priority	Award Range	Gift Aid Award Amount	Self-Help Aid Award Amount	Remaining Need
Pell	1	0-3550	1600		4200
Grant1	2	500-2000	1300		2900
Work1	3	1000-2000		2000	900
Loan1	4	200-2600		320	580
Grant2	5	500-1000			580

Example #2: Dollar Amount

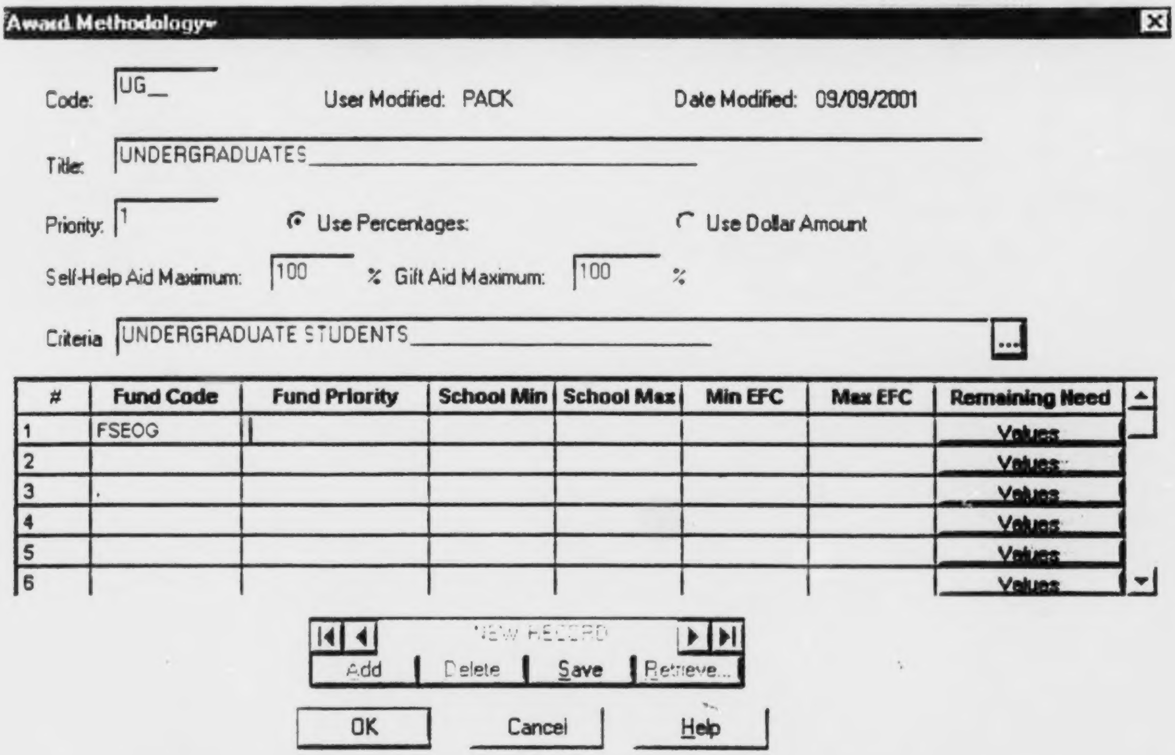
Here's another example that illustrates how the system allocates self-help and gift aid using maximum dollar amounts (Note that Pell is applied as gift aid).

COA = $10,000	EFC = 1300	Unmet Need = $8,700
Gift Aid maximum @ $4,000		
Self-Help Aid maximum @ 4,000		

Award Methodology Funds	Fund Priority	Award Range	Gift Aid Award Amount	Self-Help Aid Award Amount	Remaining Need
Pell	1	0-3550	2500		6200
Grant1	2	500-2000	1500		4700
Work1	3	1000-2000		2000	2700
Loan1	4	200-2600		2000	700
Grant2	5	500-1000			700

Setting Up Award Methodology: Instructor Demonstration (continued)

Step	Action
6	Click the **ellipsis button** to display the list of available queries. Click the Title of the desired query. In this case, click **Undergraduate Students**.
7	Click **OK.**
8	The Award Methodology dialog box displays. Click the **Fund Code** down arrow to display a list of valid fund codes for funds that you already setup in Fund Maintenance. Then select the fund you want. In this case, select **FSEOG**.



Code: UG_
User Modified: PACK
Date Modified: 09/09/2001
Title: UNDERGRADUATES
Priority: 1
● Use Percentages
○ Use Dollar Amount
Self-Help Aid Maximum: 100 %
Gift Aid Maximum: 100 %
Criteria UNDERGRADUATE STUDENTS

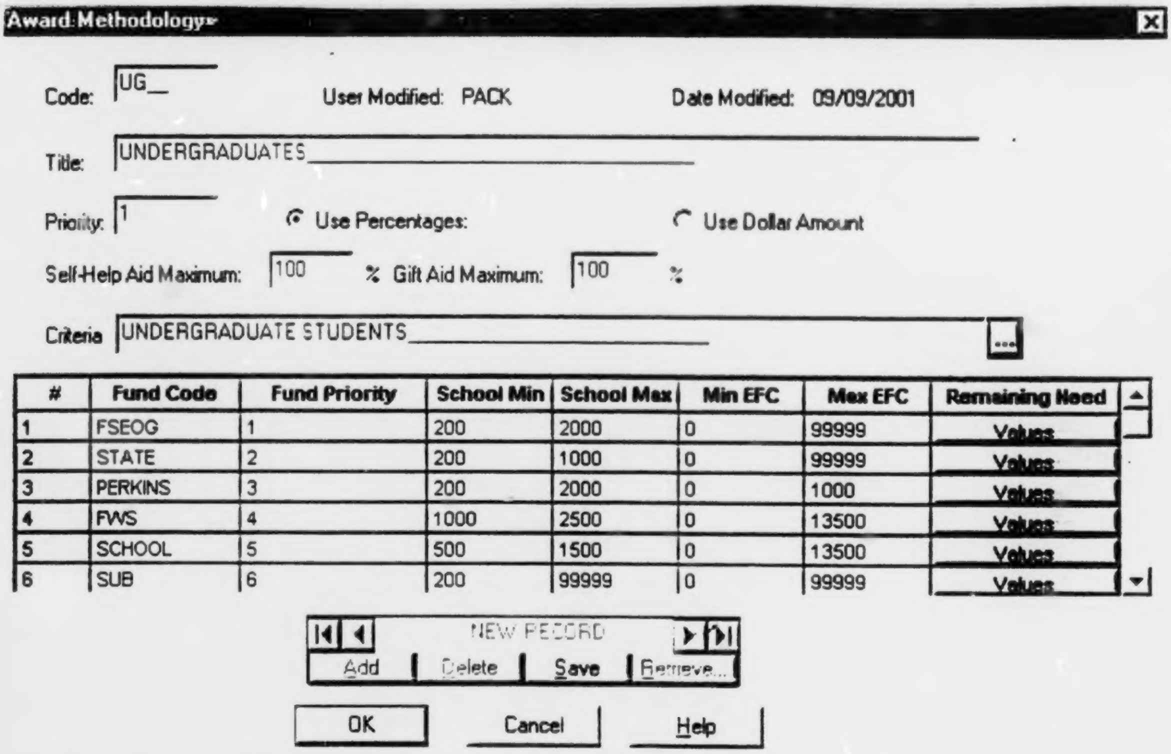
#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	FSEOG						Values
2							Values
3							Values
4							Values
5							Values
6							Values

Setting Up Award Methodology: Instructor Demonstration (continued)

Step	Action
9	Enter the Fund Priority Number. The fund priority is the order in which funds are awarded within this award methodology. In this case, we want to award FSEOG first so we enter **1**.
10	For each fund in the award methodology, you can set minimum and maximum amounts to be packaged per eligible student. Unless you enter amounts, the system will award varying amounts based on the student's unmet need. Valid amounts are 0 to 99999. Note: If a student's remaining need is less than the minimum award amount you designate, the system ignores this particular fund when packaging the student based on this methodology. In this case, enter **200** for School Min and **2000** for School Max
11	For Min EFC and Max EFC, enter the minimum and maximum EFC values to package the fund based on this award methodology. Because in this example the FSEOG fund already includes criteria that selects students with EFCs no greater than 1000, we don't need to set a value for Max EFC. Enter **0** for Min EFC and **99999** for Max EFC.
12	Access Remaining Need by clicking **Values**. This field allows you to set or update additional parameters that the system checks against when packaging the fund. Based on the values entered, each fund can be packaged in varying amounts based on up to 6 levels of remaining need. In this case, a separate Remaining Need option was available when you set up the fund. Any values you entered under Fund Maintenance defaults to this award methodology screen. You may leave them as they are or update them. When packaging, the system defaults to the Remaining Need values you update in the Award Methodology and ignores those you entered under Fund Maintenance. Click **OK** to remove the dialog box.

Setting Up Award Methodology: Instructor Demonstration (continued)

Step	Action
13	Continue to add funds until completed. Refer to the example below. Award methodologies may include up to 20 funds, including Federal Pell Grant. Therefore, if your school participates in the Pell program, you may enter up to 19 fund codes for each methodology you create. Remember: You can include only funds that have been previously setup under Fund Maintenance.
14	To save the record, click **Save**.
15	A Record Updates Saved dialog box displays. Click **OK**.
16	Click Add to continue to enter award methodologies. Otherwise click **OK** to exit.



Code: UG_
User Modified: PACK
Date Modified: 09/09/2001
Title: UNDERGRADUATES
Priority: 1
● Use Percentages:
○ Use Dollar Amount
Self-Help Aid Maximum: 100 %
Gift Aid Maximum: 100 %
Criteria UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	FSEOG	1	200	2000	0	99999	Values
2	STATE	2	200	1000	0	99999	Values
3	PERKINS	3	200	2000	0	1000	Values
4	FWS	4	1000	2500	0	13500	Values
5	SCHOOL	5	500	1500	0	13500	Values
6	SUB	6	200	99999	0	99999	Values

Lesson 9 Exercise

Instructions

Enter an award methodology record. Use the funds that you established in Lesson 8.

Recommendation: First complete the Award Methodology Worksheet found in the Appendix A.

Review

True of False:

1. ________ You can enter up to 25 Fund Codes per award methodology record.

2. ________ If you don't enter a Criteria on an award methodology record, all remaining student records will be packaged according to that award methodology.

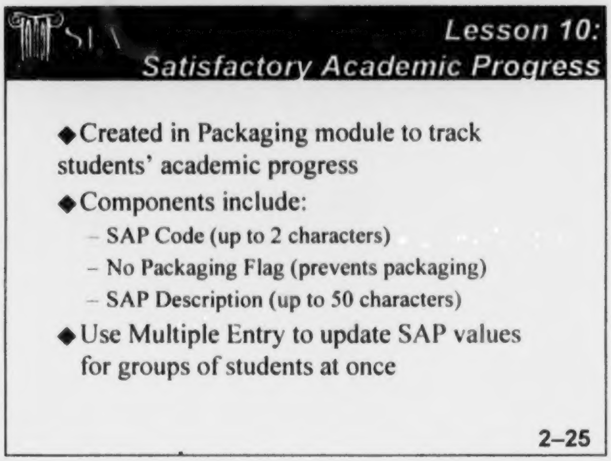
3. ________ EDExpress will not package more aid than the statutory limit for Stafford and PLUS.

4. ________ You can delete an award methodology record after you have used it to package students.

5. ________ You do not need to enter Pell Grant as a fund when creating an award methodology. EDExpress automatically calculates and awards Federal Pell Grant funds to eligible students.

6. ________ If a student meets the criteria of more than one award methodology record, the award methodology with the highest priority (where 001 is the highest priority and 999 is the lowest) will be used to package that student's aid.

7. ________ You can enter more than 20 award methodologies in EDExpress.



Lesson 10: Satisfactory Academic Progress

- ◆ Created in Packaging module to track students' academic progress
- ◆ Components include:
  - – SAP Code (up to 2 characters)
  - – No Packaging Flag (prevents packaging)
  - – SAP Description (up to 50 characters)
- ◆ Use Multiple Entry to update SAP values for groups of students at once

2–25

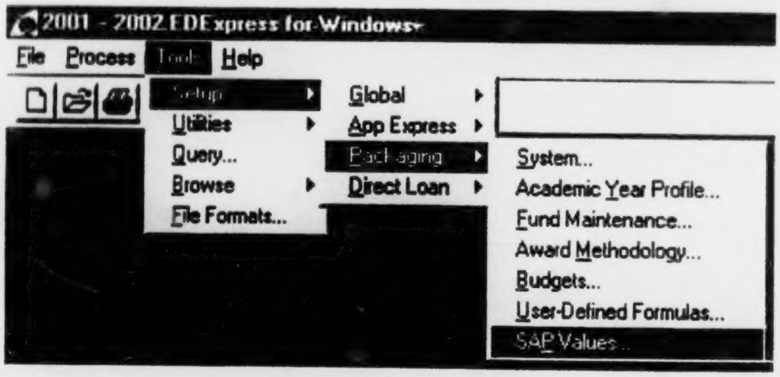
Lesson 10: Satisfactory Academic Progress (SAP)

Another setup function in EDExpress is Satisfactory Academic Progress (SAP). SAP values allow you to record the academic progress of your students based on your school's SAP policy.

Associated with codes you create, a flag can be set to interrupt the packaging process for students not making satisfactory academic progress.

The components in setting up SAP values or codes include: SAP Code, No Packaging Flag, and SAP Description. These components are described on the following page.

To setup Satisfactory Academic Progress, select **Tools/Setup/Packaging/SAP Values** from the menu bar.


2001 - 2002 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Direct Loan
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values...

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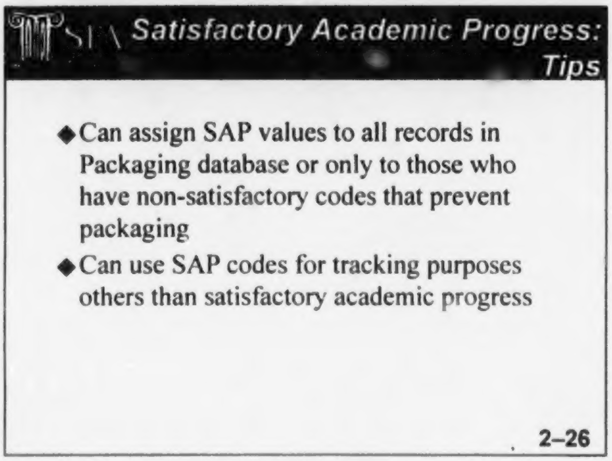
Satisfactory Academic Progress Fields

Field	Description
SAP Code	You can create an unlimited number of unique Satisfactory Academic Progress (SAP) codes or values. In this field, enter up to two alphanumeric characters.
No Packaging Flag	This field is optional. Selecting this flag prevents the student's record from being packaged as long as this particular SAP code is assigned to the student.
SAP Description	The SAP description is the title you assign to this SAP value. The description can consist of up to 50 alphanumeric characters.



Satisfactory Academic Progress: Tips

- ◆Can assign SAP values to all records in Packaging database or only to those who have non-satisfactory codes that prevent packaging
- ◆Can use SAP codes for tracking purposes others than satisfactory academic progress

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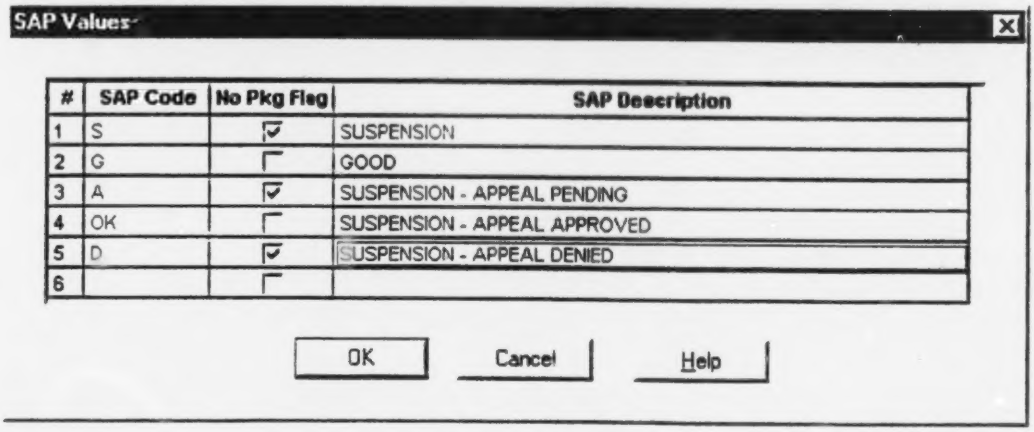
Satisfactory Academic Progress: Tips

- You can modify or delete an SAP record as long as no student records are assigned that code.
- You might choose to assign SAP values to all student Packaging records or perhaps only to those students who have non-satisfactory codes that prevent packaging.
- You can use the multiple entry function of EDExpress to update SAP values for groups of students at one time by using a query created in the Packaging module, by entering a group of Social Security Numbers, or by importing a file of Social Security Numbers.

Setting Up SAP Values: Instructor Demonstration

In this demonstration, we create several SAP records.

Step	Action
1	Select **Tools/Setup/ Packaging/SAP Values** from the menu bar. The SAP Values dialog box displays.
2	Enter the SAP Code (up to 2 alphanumeric characters). In this case, enter **S.**
3	To prevent student records with this code from packaging, check the **No Pkg Flag** box.
4	Enter the **SAP Description** (up to 50 alphanumeric characters). In this case, type **Suspension.**
5	Press the **Enter** key to create more SAP records. A blank row displays. Enter the records shown below.
6	To save the record, click **OK**.
7	A Record Updates Pending, Save Changes dialog box displays. Click **Yes**.
8	Click **OK** to exit.



#	SAP Code	No Pkg Flag	SAP Description
1	S	☑	SUSPENSION
2	G	☐	GOOD
3	A	☑	SUSPENSION - APPEAL PENDING
4	OK	☐	SUSPENSION - APPEAL APPROVED
5	D	☑	SUSPENSION - APPEAL DENIED
6		☐	

Lesson 10 Exercise

Instructions

Enter one or more SAP records that you might use at your school to monitor Satisfactory Academic Progress.

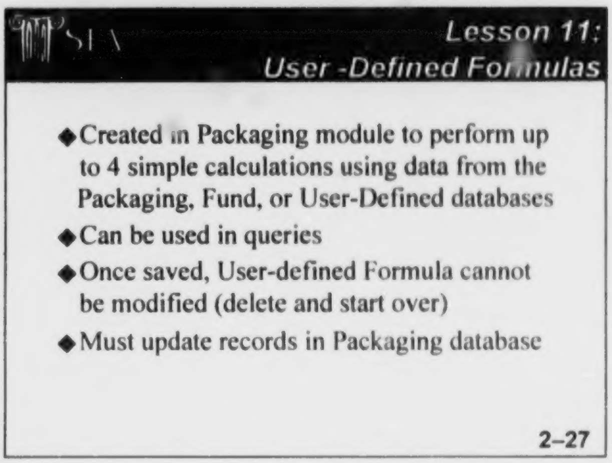
Review

True of False:

1. ________ You can create an unlimited number of SAP codes in EDExpress.

2. ________ Entering SAP records is optional.

3. ________ You can delete an SAP record even if the record has already been assigned to student packaging records.



**Lesson 11:
User -Defined Formulas**

- ◆Created in Packaging module to perform up to 4 simple calculations using data from the Packaging, Fund, or User-Defined databases
- ◆Can be used in queries
- ◆Once saved, User-defined Formula cannot be modified (delete and start over)
- ◆Must update records in Packaging database

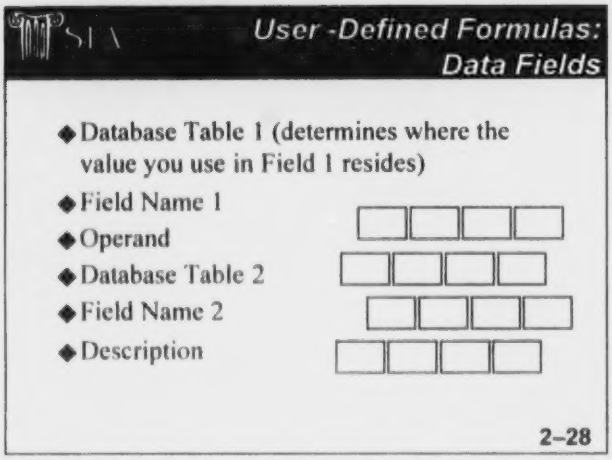
Lesson 11: User-Defined Formulas

User-Defined Formulas allow you to perform simple calculations by adding, subtracting, multiplying, or dividing data stored in two existing fields within certain EDExpress databases, (the Student Packaging database, the Fund database, and the User-Defined database). The result of the calculation is stored in the Student Packaging database and is displayed on the Awards tab. EDExpress allows you to create up to four User-Defined Formulas which can be used in queries.

Once you create and save a User-Defined Formula, you cannot modify the formula. To make changes, you must delete the formula and start over. However, when you delete a previously existing formula, you also delete all the data that was previously calculated and stored.

Examples of how you might use this feature include:

- Access the Fund database to get the total of Subsidized and Unsubsidized Stafford loans awarded to each student for the academic year
- Access the Student Packaging database to calculate the amount of each student's need that was met by subtracting remaining need from unmet need
- Access the Student Packaging database to calculate the amount of the student's contribution to the EFC
- Create a query based on a formula and tie that query to an award methodology.



User -Defined Formulas: Data Fields

- Database Table 1 (determines where the value you use in Field 1 resides)
- Field Name 1
- Operand
- Database Table 2
- Field Name 2
- Description

2–28

User-Defined Formulas: Data Fields

Each User-Defined Formula record includes the following data fields:

- Database Table 1
- Field Name 1
- Operand
- Database Table 2
- Field Name 2
- Description

These fields are described on the following page.

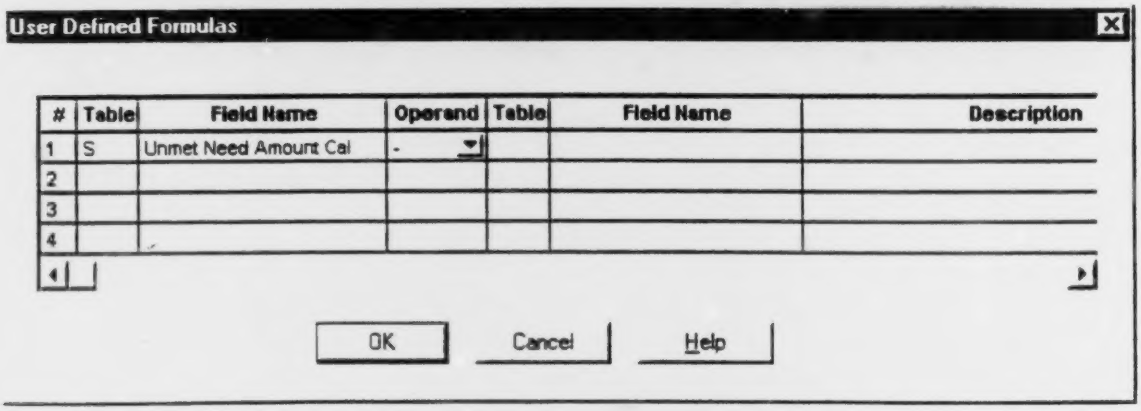
User-Defined Formula Fields

Field	Description
Database Table 1	This table determines where the value you use in Field 1 resides. The options are: S = Packaging student database F = Fund database. U = User-Defined database (will only display if a numeric User-Defined data field already exists in this database)
Field Name	Here you select the appropriate field name from the list of all fields that are available from the table chosen in the Database Table 1 field.
Operand	The operand defines what computation is performed: + = Addition - = Subtraction * = Multiplication / = Division.
Database Table 2	This second table determines where the value you use in Field 2 resides. The options are: S = Packaging student database F = Fund database. U = User-Defined database (will only display if a numeric User-Defined data field already exists in this database)
Field Name 2	Here you select the appropriate field name from the list of all fields that are available from the table chosen in the Database Table 2 field.
Description	The description is the User-Defined name associated with this formula. You create the description using any combination of 24 characters (A-Z, 0-9).

Setting Up User-Defined Formulas: Instructor Demonstration

The following demonstration shows how to create a User-Defined Formula that calculates the amount of original unmet need that is satisfied by the student's financial aid package. To do this, we subtract remaining need from unmet need.

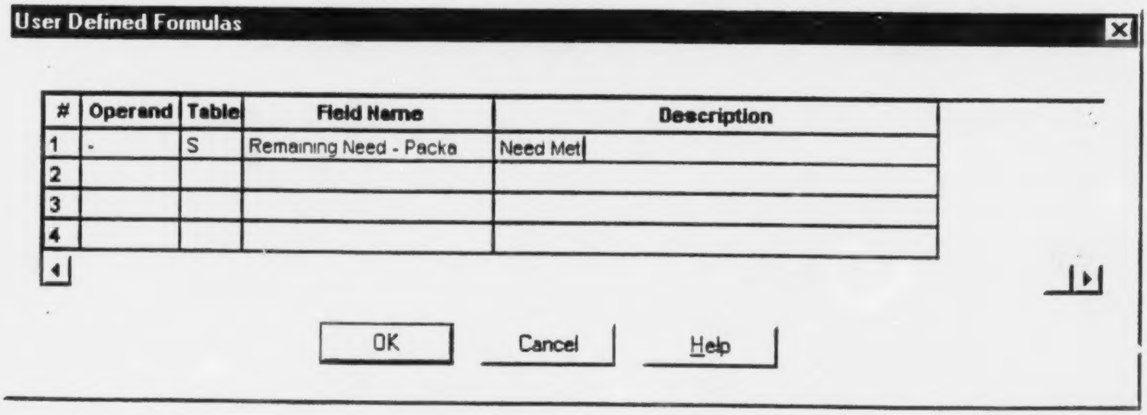
Step	Action
1	Select **Tools/Setup/ Packaging/User-Defined Formulas** from the menu bar. The User Defined Formulas dialog box displays.
2	Click the **Table** down arrow and select from the available database options. In this case, select **S** for the Student database.
3	Click the **Field Name** down arrow to display available fields in the Packaging database. Select **Unmet Need Amount Calculated - Packaging,** the field name of the data used in the first part of the calculation.
4	Click the **Operand** down arrow to display the four available types of calculations that can be performed. To have the calculation subtract, select the **minus sign** (-).



#	Table	Field Name	Operand	Table	Field Name	Description
1	S	Unmet Need Amount Cal	-			
2						
3						
4						

Setting Up User-Defined Formulas: Instructor Demonstration (continued)

Step	Action
5	Next, click the second **Table** down arrow. Since the data field for the second part of the calculation also is stored in the student database, select S.
6	Click the **Field Name** down arrow. Scroll down and select **Remaining Need - Packaging**, the field name of the data used in the second part of the calculation
7	In the description field, enter a descriptive name of up to 24 alphanumeric characters that readily identifies the User-Defined formula. In this case, type **Need Met**.
8	To save your changes, click **OK**.
9	A Record Updates Pending, Save Changes dialog box displays. Click **Yes**.
10	A Record Updates Saved dialog box displays. Click **OK**.



#	Operand	Table	Field Name	Description
1	-	S	Remaining Need - Packa	Need Met
2				
3				
4				

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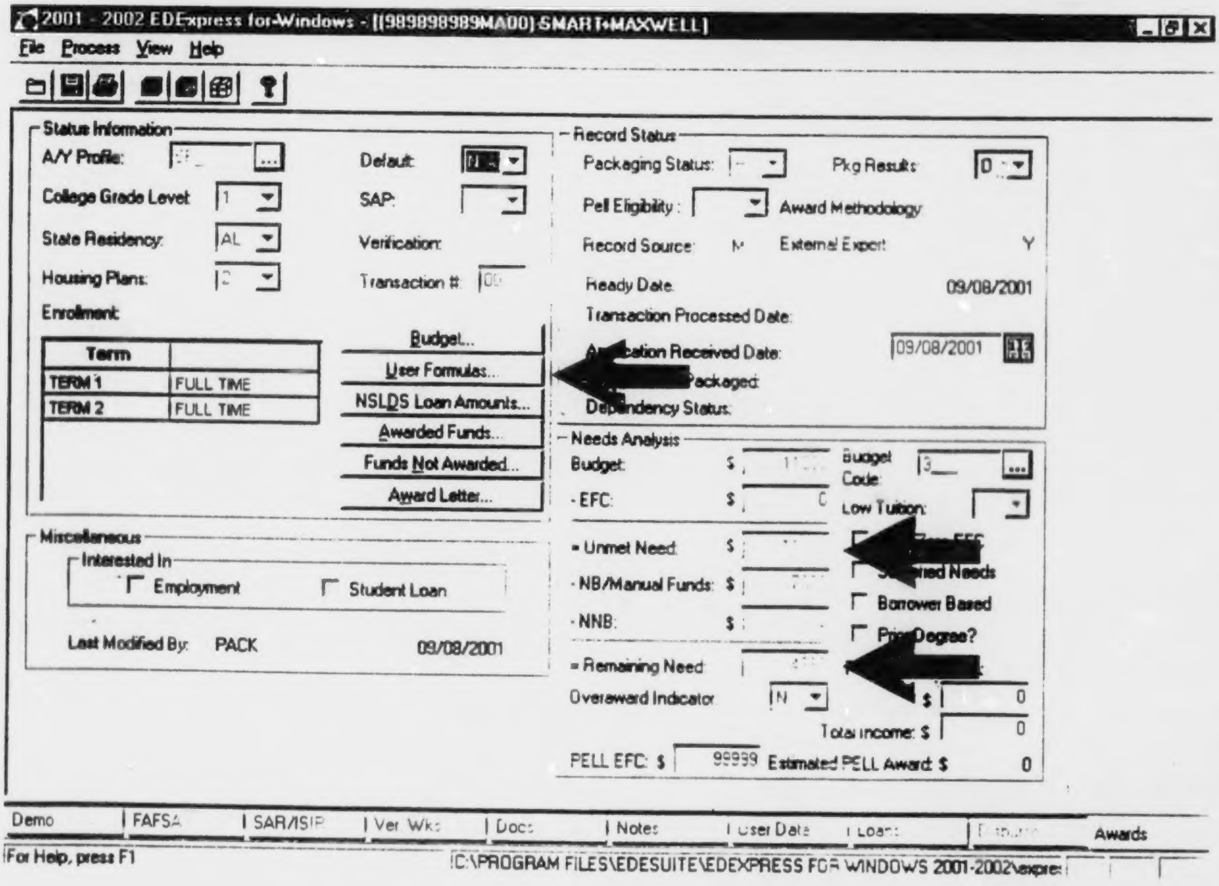
Setting Up User-Defined Formulas: Instructor Demonstration (continued)

If student packaging records existed in the Packaging database prior to your creating a User-Defined Formula, you must have EDExpress perform the formula's calculation to update those records. The Packaging System allows you to batch calculate User-Defined Formulas by selecting **Process/Calculate User-Defined Formulas** from the menu bar.

In this demonstration, we show the results of the User-Defined formulas by going to the Awards tab.

Step	Action
1	Click the **Open** icon from the tool bar.
2	Enter **989-89-8989**, the SSN for Maxwell Smart. Click **OK**.
3	The demographic record displays. Click the **Awards** tab.
4	Click the **User Formulas** button to view the results of the formula.


2001 - 2002 EDExpress for Windows - [(989898989MA00) SMART+MAXWELL]
File
Process
View
Help
Status Information
Record Status
Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Needs Analysis
Miscellaneous
Interested In
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards

A/Y Profile:
College Grade Level: 1
State Residency: AL
Housing Plans: 2
Enrollment:

Term	
TERM 1	FULL TIME
TERM 2	FULL TIME

Default:
SAP:
Verification:
Transaction #:

Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology
Record Source: M
External Export: Y
Ready Date: 09/08/2001
Transaction Processed Date:
Application Received Date: 09/08/2001
Packaged
Dependency Status:

Budget: $
- EFC: $ 0
Budget Code: 3
Low Tuition:
= Unmet Need: $
- NB/Manual Funds: $
- NNB: $
= Remaining Need:
Overaward Indicator: N
☐ Borrower Based
☐ Prior Degree?
$ 0
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award: $ 0

☐ Employment
☐ Student Loan

Last Modified By: PACK 09/08/2001

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

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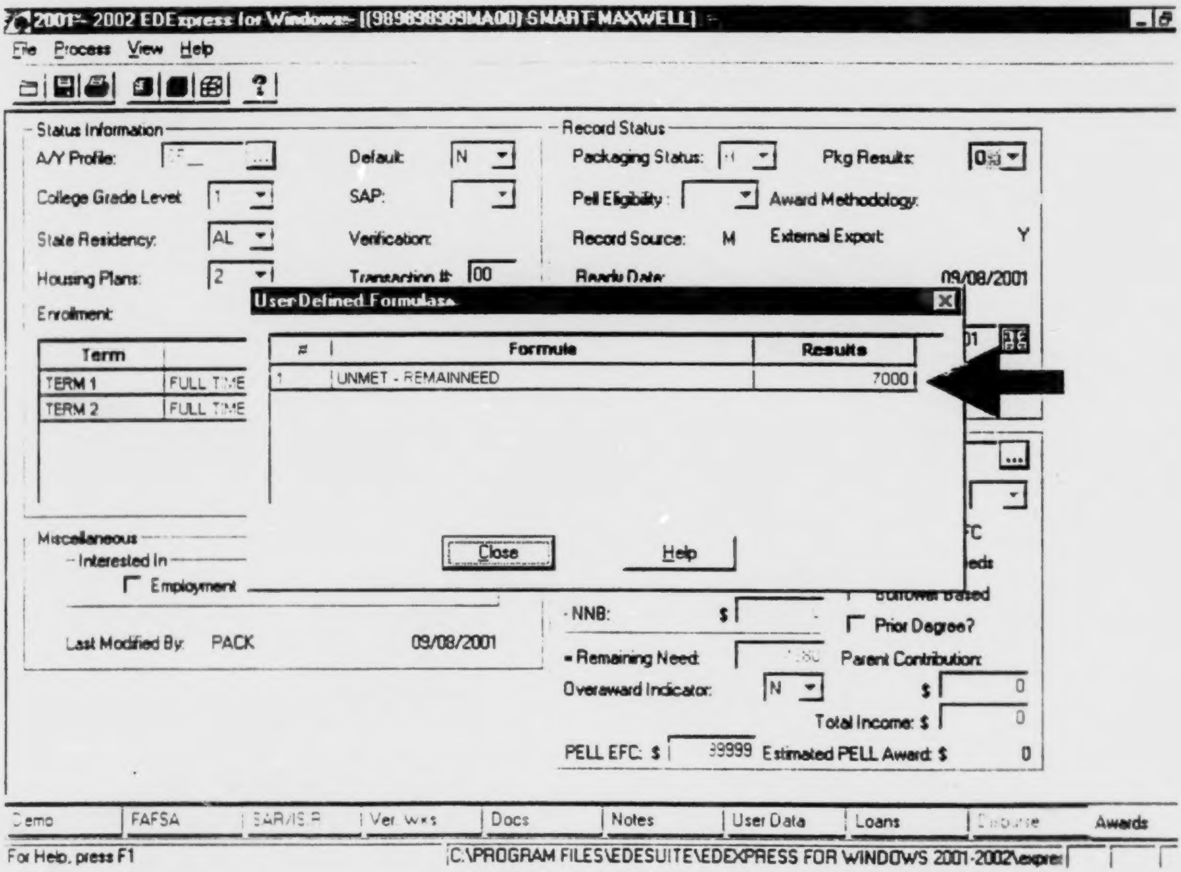
Setting Up User-Defined Formulas: Instructor Demonstration (continued)

Step	Action
5	The results of the formula display. In this example, Unmet Need ($11,380) minus Remaining Need ($4,380) equals Need Met ($7,000). Note that EDExpress abbreviates the field names when displaying the formula. Click the **Close** button.
6	Click the **Close** icon to close Maxwell Smart's record.


File
Process
View
Help
Status Information
Record Status
Enrollment
Miscellaneous
Interested In
Close
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Disburse
Awards

2001 - 2002 EDExpress for Windows - [(989898989MA00) SMART-MAXWELL]

A/Y Profile:
Default: N
College Grade Level: 1
SAP:
State Residency: AL
Verification:
Housing Plans: 2
Transaction #: 00
Packaging Status:
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: M
External Export: Y
Ready Date: 09/08/2001

User Defined Formulas

#	Formula	Results
1	UNMET - REMAINNEED	7000

Term	
TERM 1	FULL TIME
TERM 2	FULL TIME

☐ Employment
Last Modified By: PACK 09/08/2001
- NNB: $
- Remaining Need:
☐ Prior Degree?
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

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Lesson 11 Exercise

Instructions

Enter one User-Defined formula that you might use at your school. Remember some of the examples we provided of how you might use this feature:

- Access the Fund database to get the total of Subsidized and Unsubsidized Stafford loans awarded to each student for the academic year
- Access the Student Packaging database to calculate the amount of each student's need that was met by subtracting remaining need from unmet need
- Access the Student Packaging database to calculate the amount of the student's contribution to the EFC
- Create a query based on a formula and tie that query to an award methodology.

Review

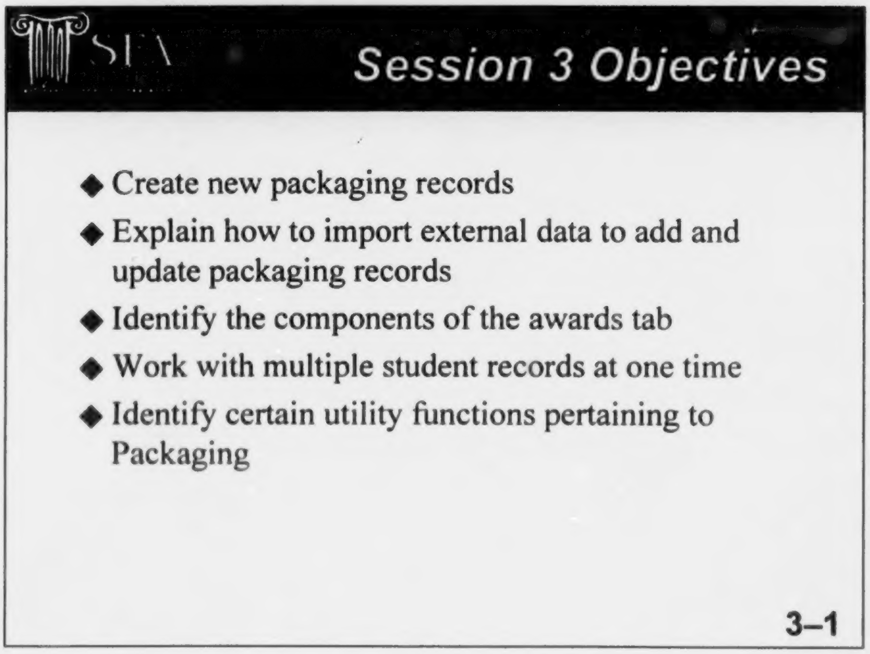
True of False:

1. ________ Entering User-Defined formulas is optional.
2. ________ You can create as many User-Defined formulas as you need.
3. ________ Once you create and save a formula, you can modify it.

Session 3: Managing Data

Lesson 1: Importing ISIR Data
Lesson 2: Importing External Data
Lesson 3: Working with Packaging Data
Lesson 4: Manual Entry
Lesson 5: Process Function
Lesson 6: Utilities Functions

Session 3—Managing Data



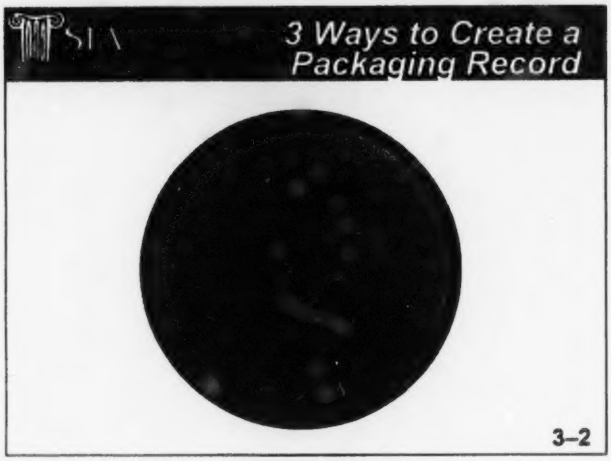
Session 3 Objectives

- Create new packaging records
- Explain how to import external data to add and update packaging records
- Identify the components of the awards tab
- Work with multiple student records at one time
- Identify certain utility functions pertaining to Packaging

Key Terms

Trankey

The trankey is the student's SSN followed by the first two letters of the last name and transaction number. For example, Harold Stanton (SSN = 126-81-5096) submits a FAFSA on the Web application, which is the first transaction. The trankey for that application record would be: 126815096ST01.



SFA

3 Ways to Create a Packaging Record

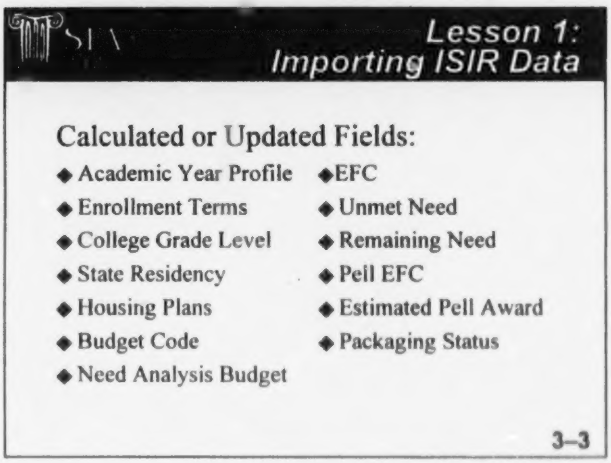
3–2

Managing Data

Once all the Packaging and Global System Setups are in place, you are ready to create student packaging records.

There are 3 ways to create a packaging record:

- **ISIR data import:** An ISIR data import is the most efficient way to create packaging records. With this method, you simply move student data from the EDExpress Apps Module to the Packaging Module.
- **Manual entry**: Schools that do not require that all of their financial aid applicants file a FAFSA need another method. Manual entry can be done without a FAFSA.
- **External data import:** Imports external data (student name, Social Security Number etc.) from your school's database into EDExpress.



Lesson 1: Importing ISIR Data

Calculated or Updated Fields:

- Academic Year Profile
- Enrollment Terms
- College Grade Level
- State Residency
- Housing Plans
- Budget Code
- Need Analysis Budget
- EFC
- Unmet Need
- Remaining Need
- Pell EFC
- Estimated Pell Award
- Packaging Status

3–3

Lesson 1: Importing ISIR Data

The ISIR Import function takes data from the existing EDExpress Apps database and uses it to create an associated record in the Packaging database. The student's record in the Packaging database is displayed on the Awards tab.

EDExpress imports data into the Packaging Module only for those ISIR records that have valid EFCs. Rejected and duplicate ISIR records are not imported. A duplicate ISIR record is one that has the same trankey as another record already in the database.

For students having multiple ISIR transactions/records, the transaction currently active is the record imported. Generally the most recent transaction will be the active one. However, you can activate any non-rejected transaction you want to import. You also can import subsequent ISIR transactions to update a student's packaging record, but only as long as the student has not been packaged.

Depending on the options you select when you import ISIR records and on the criteria the student records meet, the EDExpress Packaging Module calculates or updates certain fields for each packaging record created by an ISIR import. The fields that are calculated or updated are described on the following page.

Calculated and Updated Fields During ISIR Import

Field	Packaging Module Action	Source
A/Y Profile (Academic Year Profile)		Based on selection you make at import
Enrollment Term(s)		Based on Academic Year Profile assigned to the student's record at import
College Grade Level	Updated	ISIR record
State Residency	Updated	ISIR record
Housing Plans	Updated	ISIR record (or the default indicated in the Packaging System setup)
Budget Code	Excluded or Included	User choice when importing ISIR records into the Packaging database
Needs Analysis Budget	Calculated	Based on the Budget Code assigned to the student's record
EFC	Calculated	From the ISIR record based on the number of months indicated in the AYP setup
Unmet Need	Calculated	Need Analysis Budget minus the EFC
Remaining Need	Calculated	Unmet Need minus total of awarded funds.
Pell EFC	Calculated	The 9-month EFC from the ISIR record used to calculate Pell Grant eligibility.
Estimated Pell Award	Calculated	Based on the value of the Pell EFC
Packaging Status	Updates to R (ready to package) or Updates to N (not ready to package)	If all documents have been Received or Waived If students have not returned assigned documents

Importing ISIR Data into the Packaging Module:

Instructor Demonstration

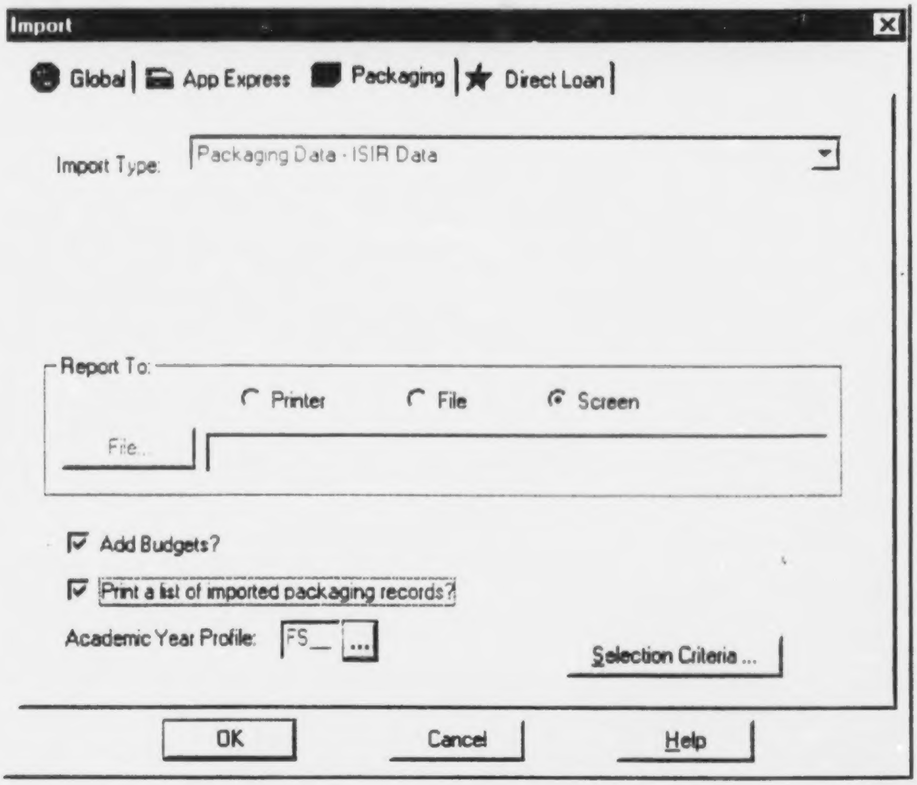
In this demonstration, we import records from the App Express ISIR database into the Packaging module. This method of creating records in the Packaging database assumes that you have already imported processed ISIRs into the App Express module.

Step	Action
1	Select **File/Import** on the menu bar. Click the **Packaging** tab.
2	Click the down arrow on the import type field to display a list of file types that can be imported. Select **Packaging Data – ISIR Data.**
3	Click **Printer, File** or **Screen** as the output destination you want for the summary edit report that generates. If you select file, click the ellipsis (…) button and enter a file name. In this case, click **Screen**.
4	Leave Add Budgets? marked to automatically add budgets to student records imported into the Packaging database.
5	Click **Print a list of imported packaging records?** to print a complete listing of all the records in the edit report
6	The Academic Year Profile (AYP) you indicated as the default in Packaging System Setup displays. If you want to select a different AYP, click the ellipsis (…) button to select from the list of available AYP codes. In this case, leave the default AYP.
7	Click the **Selection Criteria** button to specify a group of records to import.
8	Click either the Select Records button to choose individual ISIR records from a list or the Query Title ellipsis button to display the list of queries created in the Apps Module. In this case, click the **Select Records** button.
9	When you click the Select Records button, ISIR records display in Social Security Number order. To sort the ISIR records in alphabetical order, click the **Student's Last Name** column heading, right click, then select **Quick Sort Ascending**.

Importing ISIR Data into the Packaging Module:

Instructor Demonstration (continued)

Step	Action
10	To select individual ISIR records, click the Selected box of each record you want to import. To import all records into the ISIR file, choose Select All. In this case, click **Select All**.
11	All records are marked. Click **OK.**
12	Click **OK** again to begin the import process.
13	When the import is done, a Packaging Import ISIR Data dialog box displays. Click **OK** to continue.
14	An edit report generates. If you selected the **Print a List of Imported Packaging Records?** option, the edit report includes a complete list of each ISIR record and its import status (Add or Reject) along with summary totals. Note that ISIR records with CPS rejects were not imported. Click **Close** to exit.



Import Type: Packaging Data - ISIR Data

Report To:
○ Printer ○ File ● Screen

☑ Add Budgets?
☑ Print a list of imported packaging records?
Academic Year Profile: FS__

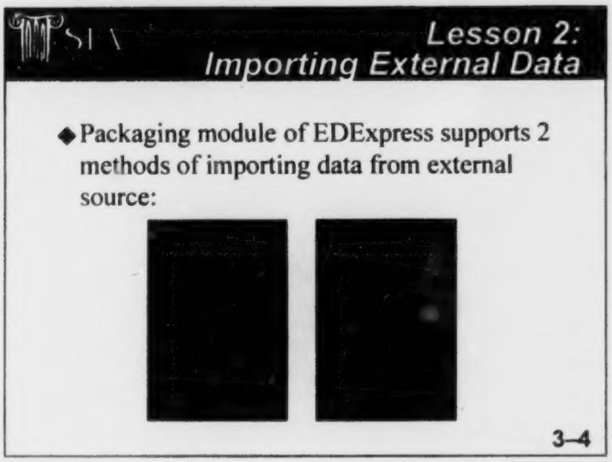
Lesson 1 Exercise

Instructions

Import all ISIR records to create student records in your packaging database.

Use the following options:

- Select report to screen
- Make sure that the add budget option is marked
- Use the default academic year profile.
- Select all
- Note the number of records that import into your packaging database



Lesson 2:
Importing External Data

- Packaging module of EDExpress supports 2 methods of importing data from external source:

3–4

Lesson 2: Importing External Data

In addition to manual entry and ISIR import, you can create student packaging records by importing data from external sources, such as your school's records. You also can import external data to change or update fields in existing records. All data you import must conform to EDExpress record layouts. Your information systems technical support staff should be able to assist you with this. You can print the record layouts for each type of data import within the Packaging module. Record layouts are also published in the Packaging Technical Reference. You can download a copy of the Packaging Technical Reference from the Internet: **SFAdownload.ed.gov**
Once you create the appropriate file in the format specified by the record layout, you can import it into EDExpress.

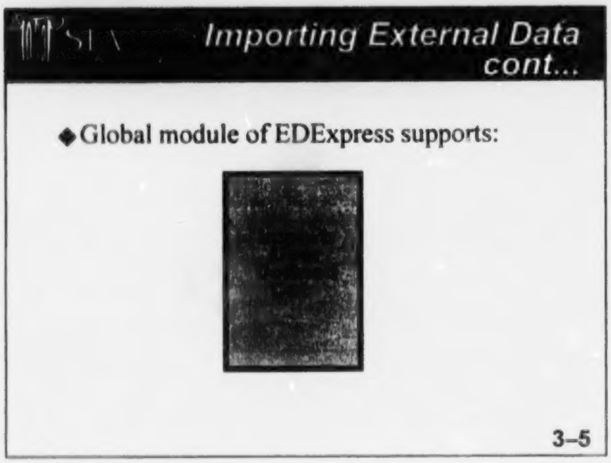
Import: External Add

The external add import is most useful for students who will not file a FAFSA. The import creates student packaging records in a process very similar to the ISIR import. First, the imported data creates a demographic record in the Apps module. Then, this data is transparently moved to the Packaging module.

When processing an external add import, populate as many of the fields in the student's demographic and packaging records that are applicable to and available from your information source. To create the demographic record, the required fields include the student's SSN, Name ID, and Transaction Number. To create the packaging record, the required fields include the academic year profile, budget code, and college grade level.

Import: External Change

The external change import updates existing student packaging records, regardless of the method used to create them (manual entry, ISIR import, or external add). An example of an external change that you might want to import is a change of address not reported on an ISIR.



Importing External Data cont...

- Global module of EDExpress supports:

3-5

Import: User-Defined Data

A third method of importing data is available. This function can be used to update any user-defined fields you created in the User Database. The process is similar to external add and external change imports, except that it occurs in the Global module. (User-defined data is available to all modules of EDExpress.) The record layout for User Data Import is available in the Global module via the print function.

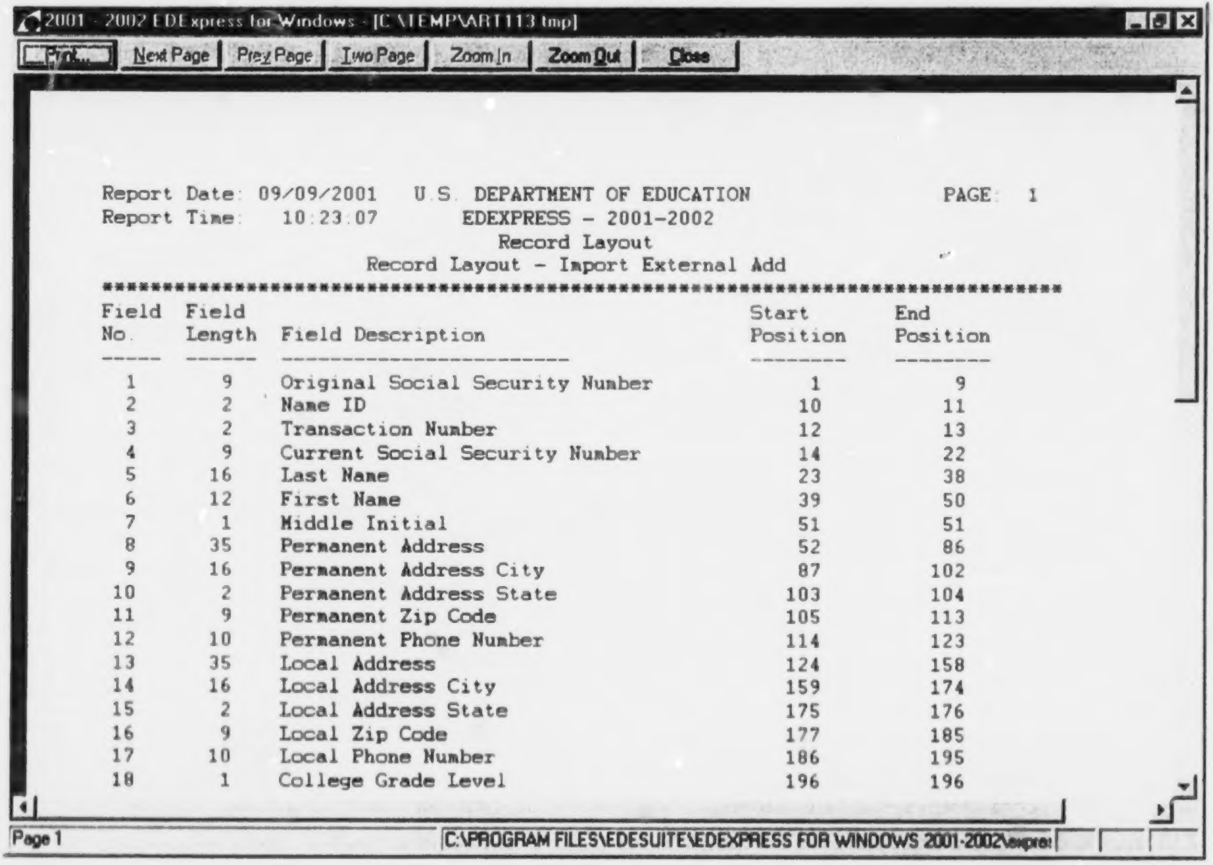
You can define as user data any information you may need in packaging that does not have an existing EDExpress data field associated with it. For example, user-defined data may be needed if you award aid based on program or GPA or if you use EDExpress to track satisfactory academic progress (SAP). Other examples include student's major, cumulative grade point average, (GPA) and credits earned.

Importing External Data to Create Packaging Records:

Instructor Demonstration

In this demonstration, we show you where to perform the external add import. First we show you where to find the record layouts that you would need to create the import file.

Step	Action
1	From the main menu, click the **Print** icon.
2	Click the **Packaging** tab.
3	Click the down arrow in the **Report** box and review the options. Select **Record Layout - Import External Add**.
4	Click on **Screen** to route the record layout to the screen.
5	Click **OK**. The record layout displays.


2001 - 2002 EDExpress for Windows - [C:\TEMP\ART113.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

```
Report Date: 09/09/2001   U.S. DEPARTMENT OF EDUCATION              PAGE:  1
Report Time:    10:23:07       EDEXPRESS - 2001-2002
                                  Record Layout
                        Record Layout - Import External Add
********************************************************************************
Field  Field                                          Start       End
No.    Length  Field Description                      Position    Position
-----  ------  ------------------------               --------    --------
  1       9    Original Social Security Number            1           9
  2       2    Name ID                                   10          11
  3       2    Transaction Number                        12          13
  4       9    Current Social Security Number            14          22
  5      16    Last Name                                 23          38
  6      12    First Name                                39          50
  7       1    Middle Initial                            51          51
  8      35    Permanent Address                         52          86
  9      16    Permanent Address City                    87         102
 10       2    Permanent Address State                  103         104
 11       9    Permanent Zip Code                       105         113
 12      10    Permanent Phone Number                   114         123
 13      35    Local Address                            124         158
 14      16    Local Address City                       159         174
 15       2    Local Address State                      175         176
 16       9    Local Zip Code                           177         185
 17      10    Local Phone Number                       186         195
 18       1    College Grade Level                      196         196
```

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Importing External Data to Create Packaging Records: Instructor Demonstration (continued)

Step	Action
6	The record layout lists all of the fields that you could import from another on-campus system. You would print this layout to provide to your data processing staff. Click the **Close** button to exit.
7	Once you had created a file in the required format, you would import the records from the file into EDExpress. Click the **Import** icon on the toolbar.
8	The Import dialog box displays. Click the **Packaging** tab.
9	Click the down arrow for Import Type and review the import options. Select **Packaging Data - External Add.**
	At this point we will stop the demonstration because we do not have an actual external file to import. If you had an actual file on your harddrive to import, you would complete the steps below. Skip the Prompt for Duplicate and Print a List of Imported Packaging Records? The progress bar shows the import was successfully completed.
10	Click **File** to display the Open file dialog box.
11	Locate and select the file to import. Click **Open**.
12	Mark the Report To field as **Printer, File, or Screen**.
13	Mark the **Prompt for Duplicates?** checkbox if you want to be notified of any duplicate records on the imported file. Regardless of whether you select this checkbox, EDExpress will not import duplicate records.
14	Mark the **Print a list of imported packaging records?** if you want to produce a list of the records on your import file.
15	Click **OK**.
16	Click **OK** to view the report. Click anywhere on the report page to zoom in for closer view. When finished viewing the report, click **Close** or **Print**.

Lesson 2 Exercise

Instructions

Print the record layout for an Import External Add to the screen. Review the report and answer the questions below.

Review

True of False:

1. ________ You can import the student's enrollment status from another system using the Import External Add.

2. ________ You can import the student's name and address from another system using the Import External Add.

3. ________ You can import the student's Federal Pell Grant award amount from another system using the Import External Add.

4. ________ You can import the student's Federal SEOG award amount from another system using the Import External Add.

5. ________ You can import the student's housing plans (e.g. whether or not the student will live on campus) from another system using the Import External Add.

Lesson 3: Working with Packaging Data

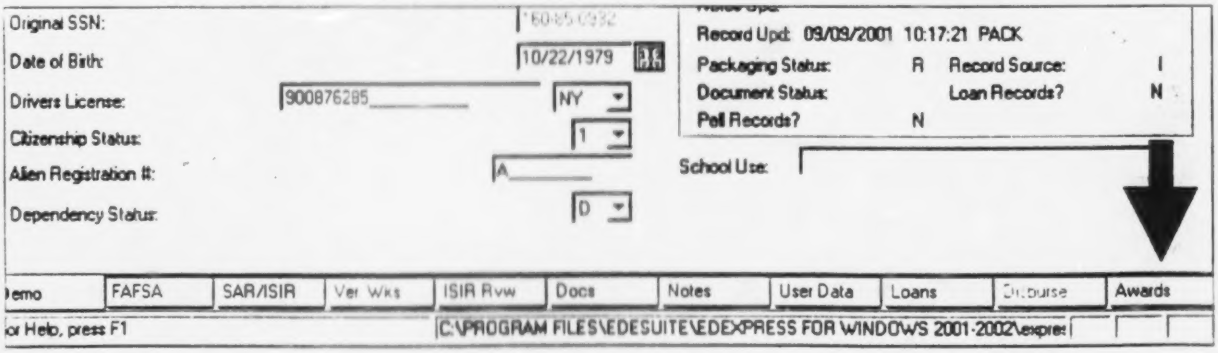
Every student record in the EDExpress Apps Express database has an accessible Awards tab, even those ISIR records not imported into the Packaging database. You can tell whether records in the Apps database also have Packaging data by looking at the information displayed on the Awards tab.

Let's look at the Awards tab for one of the records that was imported from the ISIR database into the Packaging module.

Opening Packaging Records: Instructor Demonstration

You open Packaging records just as you would any other record in the Apps Express database.

Step	Action
1	To open a student record: Select **File/Open**. The Open Student dialog box displays. Enter the student's Social Security Number.
2	If you don't know the Social Security Number, click the **ellipsis button** to display a list of names in the Apps Express database. Click the desired student record. In this case, select **SSN 160-85-0932 for Anthony Santos**. Then click **OK**.
3	Click **OK** to open the record. The student's demographic record displays.
4	Click the **Awards** tab to view the packaging information for this student. The Awards tab is found on the bottom right side of the screen.



Original SSN: 160850932
Date of Birth: 10/22/1979
Drivers License: 900876285 NY
Citizenship Status: 1
Alien Registration #: A
Dependency Status: D
Record Upd: 09/09/2001 10:17:21 PACK
Packaging Status: R
Record Source: I
Document Status:
Loan Records? N
Pell Records? N
School Use:

or Help, press F1
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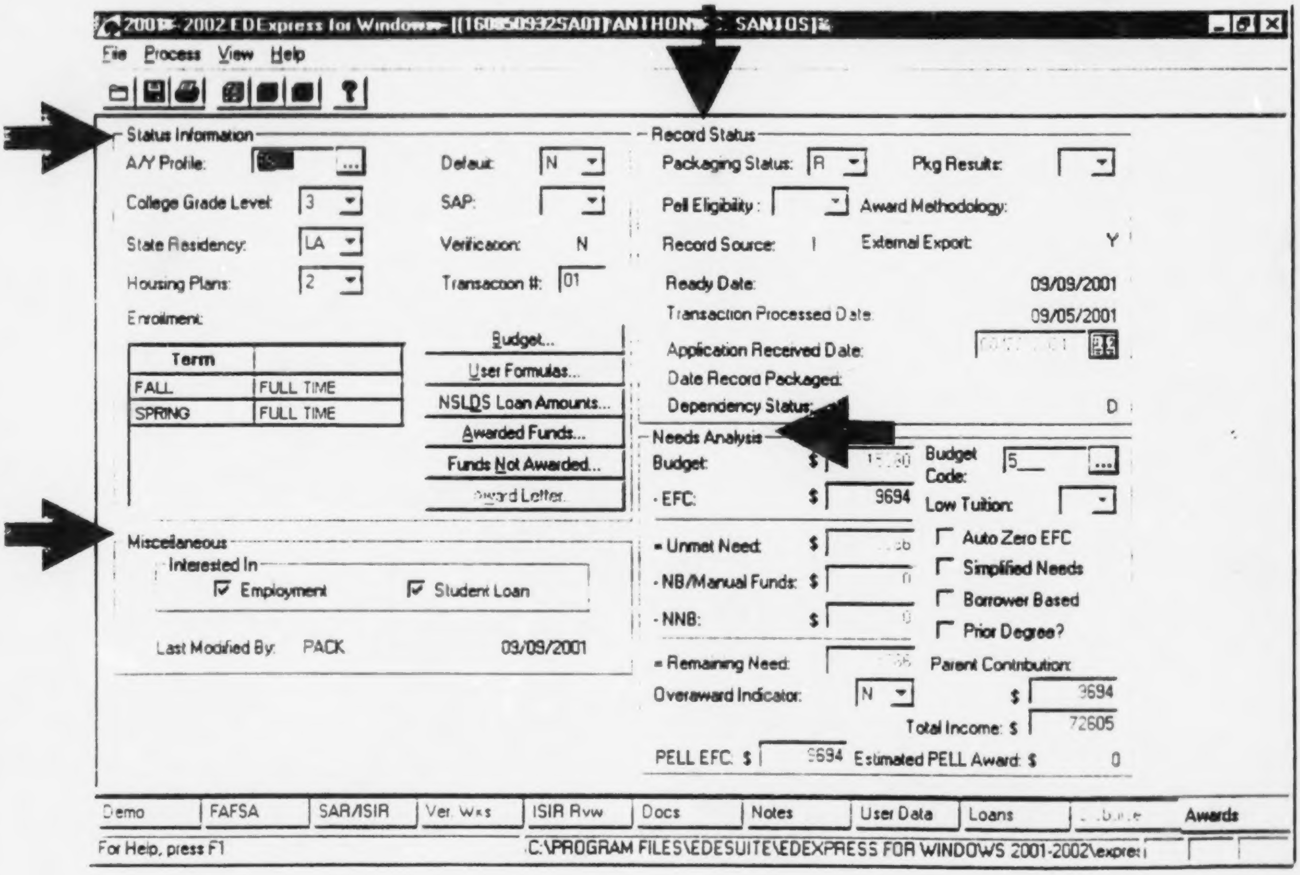
Awards Tab Review

Any information displayed on the screen was imported from the ISIR record and/or calculated during the import process according to the options you selected.

Notice that there are icons on the toolbar in the shape of boxes, or packages. Selecting these icons allows you to perform 3 functions: Package, Unpackage, and Repackage. When displayed, the icons are in color. Package is green; Unpackage is red; Repackage is yellow. Because the Package icon is displayed, you can tell that a Packaging record exists in the database for this student.

Information on the Awards tab is grouped into four areas on the screen:

- Status information (upper left)
- Miscellaneous (lower left)
- Record Status (upper right)
- Needs Analysis (lower right)


2001-2002 EDExpress for Windows - [(160850932SA01) ANTHONY C. SANTOS]
File
Process
View
Help
Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards

Status Information
A/Y Profile:
College Grade Level: 3
State Residency: LA
Housing Plans: 2
Default: N
SAP:
Verification: N
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 09/09/2001
Transaction Processed Date: 09/05/2001
Application Received Date:
Date Record Packaged:
Dependency Status: D

Miscellaneous
Interested In
☑ Employment
☑ Student Loan
Last Modified By: PACK 09/09/2001

Needs Analysis
Budget: $
- EFC: $ 9694
= Unmet Need: $
- NB/Manual Funds: $ 0
- NNB: $ 0
= Remaining Need:
Overaward Indicator: N
Budget Code: 5
Low Tuition:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 9694
Total Income: $ 72605
PELL EFC: $ 9694
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expres

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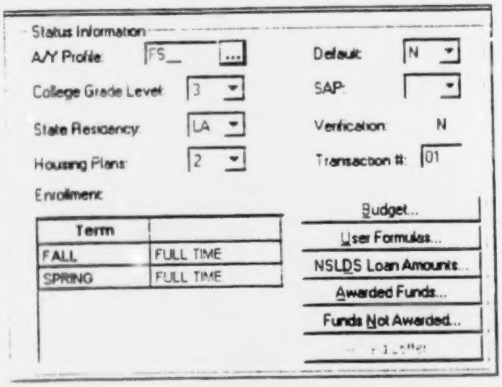
Status Information

Of the fields included in this section of the Awards screen, AYP and College Grade Level values are required to create a packaging record.

- **A/Y Profile** is the Academic Year Profile you assigned when the record was imported.
- **College Grade Level** defaults to the value on the student's ISIR.
- **State Residency** defaults to the value on the student's demographic record.
- **Housing Plans** defaults to the value on the student's ISIR.
- **Enrollment** defaults to the value assigned in the AYP Setup.
- **Default** is automatically populated from the ISIR. Otherwise, the system defaults to N. This field indicates whether the student is in default on an educational loan or owes a repayment on a grant.
- **SAP** is the value you select to indicate the student's academic progress.
- **Verification** is populated from the ISIR.
- **Transaction #** is the number assigned to the ISIR transaction by the CPS.
- **Budget** values default based on the Budget Code assigned.
- **User-Formulas** default to the formulas you defined in Packaging Setup, along with the results for the formulas that apply to the student's record. The values are calculated in the import process if set up prior to importing into Packaging or during the save process if set up after importing into Packaging. They can also be calculated from the main menu by choosing Process/Calculate User-Defined Formula.

New!

- **NSLDS Loan Amounts** displays the aggregate Subsidized, Unsubsidized, and Perkins loan amounts for as imported from the ISIR. This is a new feature in the 2001-2002 software. However, EDExpress only displays the aggregate loan amounts. It does not contain edits to prevent you from awarding loans that might exceed the aggregate loan limits.
- **Awarded Funds** displays the aid awarded as well as the student's fund decision for each fund. This field will be blank until you package the student.
- **Funds Not Awarded** displays a list of funds not awarded (and the reason each fund was not awarded) within the award methodology assigned, if the student has been packaged.
- **Award Letter** displays information relative to the student's award letter, if the student has been packaged.



A/Y Profile: FS_
College Grade Level: 3
State Residency: LA
Housing Plans: 2
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

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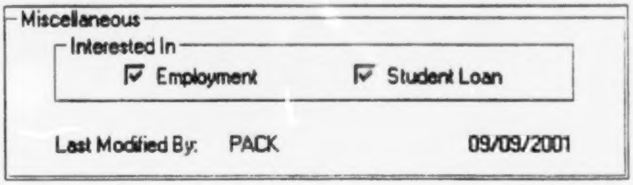
Miscellaneous

The two fields included in this area indicate the student's preference for loans and work as reported on the FAFSA and updated with the ISIR import.



☑ Employment ☑ Student Loan

Last Modified By: PACK 09/09/2001

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Record Status

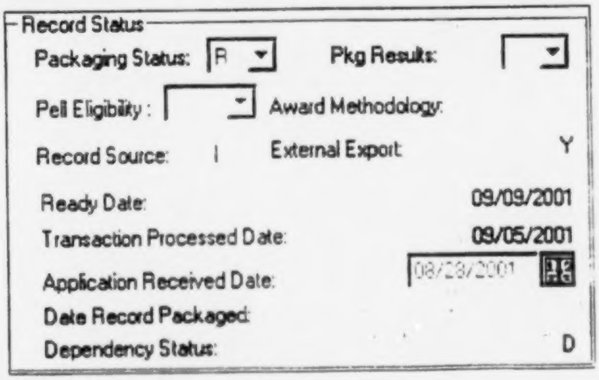
The two most important fields for monitoring what is happening with the student's record are Packaging Status and Pkg. Results.

- **Packaging Status** indicates the current status of the record and displays one of the following codes:

  P = Packaged, U = Unpackaged, R = Ready to package, M = Manually Adjusted, N = Not ready to package, H = Hand packaged

  You can manually update the Packaging Status field only when the Packaging Status is R or U. When you manually adjust awards packaged by the system, the Packaging Status defaults to M. When you manually add awards (or hand package the student) to indicate that the student is packaged, update the Packaging Status to H.
- **Pkg Results** indicates action taken by the student or the financial aid administrator regarding the award packaged. After the packaging process runs, the field value defaults to the value indicated in the Packaging System Setup: A = Accepted O = Offered D = Declined S=Suspend
- **Pell Eligibility** displays the student's Pell Eligibility status as defined by the CPS and imported with the ISIR. Valid values are Y (Pell Eligible) and blank (Not Pell Eligible).You can manually update this field only when the Record Source status is E or M.
- **Record Source** field displays how the record was originated.

  E = External Import I = ISIR Originated M = Manually Originated.
- **Award Methodology** displays the award methodology code automatically assigned by the system and used to package the student. This code will display once the student record has been packaged.
- **External Export** indicates if this record was exported to an external file. Valid codes are Y (yes) and N (no).
- **Ready Date** displays the date that the student's packaging status changed to R.
- **Transaction Processed Date** displays the date that the FAFSA transaction was processed by CPS.
- **Application Received Date** displays the date that the FAFSA was received by CPS for processing (or the Transaction Receipt Date on the ISIR).
- **Date Record Packaged** displays the most recent date the record was packaged.
- **Dependency Status** defaults to the value from the student's demographic record.


Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility :
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 09/09/2001
Transaction Processed Date: 09/05/2001
Application Received Date: 08/28/2001
Date Record Packaged:
Dependency Status: D

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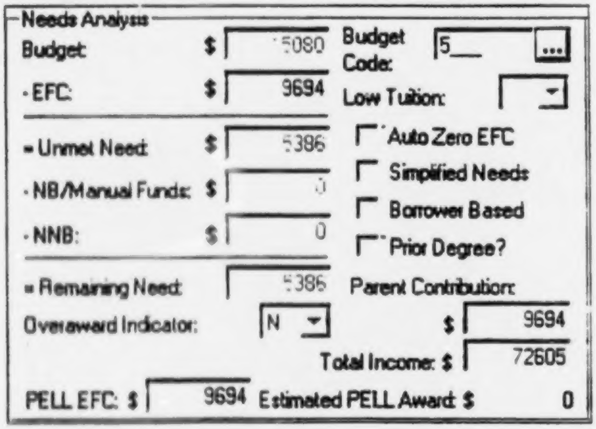
Needs Analysis

All the fields in this area are used to calculate and identify the student's need. A Budget Code is required to package the record.

- **Budget Code** displays the budget used to package the student.
- **Budget** displays the total of the student's budget based on Budget Setup for the budget code assigned, plus or minus any manual adjustments made to the student's budget.
- **EFC** displays the primary EFC from the student's ISIR. You can modify the value in this field if you selected the Allow imported Pell EFC to be modified option in the Packaging System Setup.
- **Unmet Need** displays the result of subtracting the EFC from the Budget.
- **NB/Manual Funds** displays the total of all need-based funds awarded.
- **NNB** displays the total of Unsubsidized Stafford, PLUS, or Non Need-Based loans awarded.
- **Remaining Need** displays the total of the budget, minus the EFC, minus the Awarded Funds.
- **Low Tuition** displays values only if you selected this option in Packaging System Setup.

  This option is only for schools that receive approval from the Department of Education to award Pell based on the Alternate Pell Grant Schedules for Students with Low Assessed Tuition. Students matching this category have an EFC of $300 or less, a budget of $3000 or higher, and a combined cost of Tuition/Dependent Child Care/Disability Expenses of less than $300.
- **Auto Zero EFC** is populated if the record is imported from an ISIR with a 0 EFC based on an automatic zero EFC calculation.
- **Simplified Needs** is populated based on the imported ISIR record.
- **Borrower Based** allows you to use prior term eligibility to package the student, according to the Borrower Based federal rules and regulations. If you select this option, the system increases the subsidized loan limits to twice the amount of the annual loan limit for the student college grade level during packaging. **The amounts for each disbursement are allocated according to the percentages you defined for the AYP and will not be correct. You must manually adjust the amounts.**
- **Prior Degree** is populated based on the imported ISIR record to indicate that the student has a prior undergraduate degree.



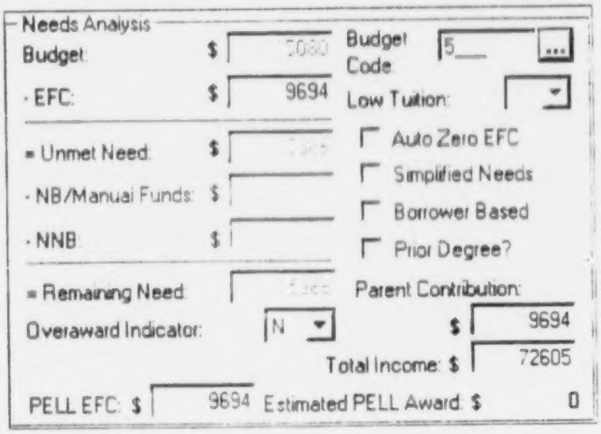
Needs Analysis
Budget: $ 15080
- EFC: $ 9694
= Unmet Need: $ 5386
- NB/Manual Funds: $ 0
- NNB: $ 0
= Remaining Need: 5386
Overaward Indicator: N
Budget Code: 5
Low Tuition:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 9694
Total Income: $ 72605
PELL EFC: $ 9694
Estimated PELL Award: $ 0

Needs Analysis (continued)

- **Overaward Indicator** shows that a student's remaining need eligibility is less than zero. The values for this field are:

  Y = Overaward exists, E = Exception, N = No overaward exists, R = Resolved

  When set to Y, the system will not package need based aid. **It's important to note that, in this context, the term "overaward" refers to eligibility for need-based aid only. It does not mean the student received an overaward of federal aid.**
- **Parent Contribution** displays the total parent contribution used in the EFC calculation from the imported ISIR record.
- **Total Income** displays the total income from the ISIR for the independent student, and the sum of the student's total income and the parent's total income for the dependent student.
- **Pell EFC** displays the 9-month EFC from the imported ISIR record and used to calculate the Estimated Pell Award. You can modify the value in this field if you selected the Allow Imported Pell EFC to Be Modified option in the Packaging System Setup.
- **Estimated Pell Award** displays the Pell Award derived from the appropriate Pell payment chart based on the Pell EFC. The record does not need to be packaged in order for this value to be displayed.



Needs Analysis

Budget: $ [illegible]

Budget Code: 5

- EFC: $ 9694

Low Tuition:

☐ Auto Zero EFC

☐ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

= Unmet Need: $ [illegible]

- NB/Manual Funds: $

- NNB: $

= Remaining Need: [illegible]

Overaward Indicator: N

Parent Contribution: $ 9694

Total Income: $ 72605

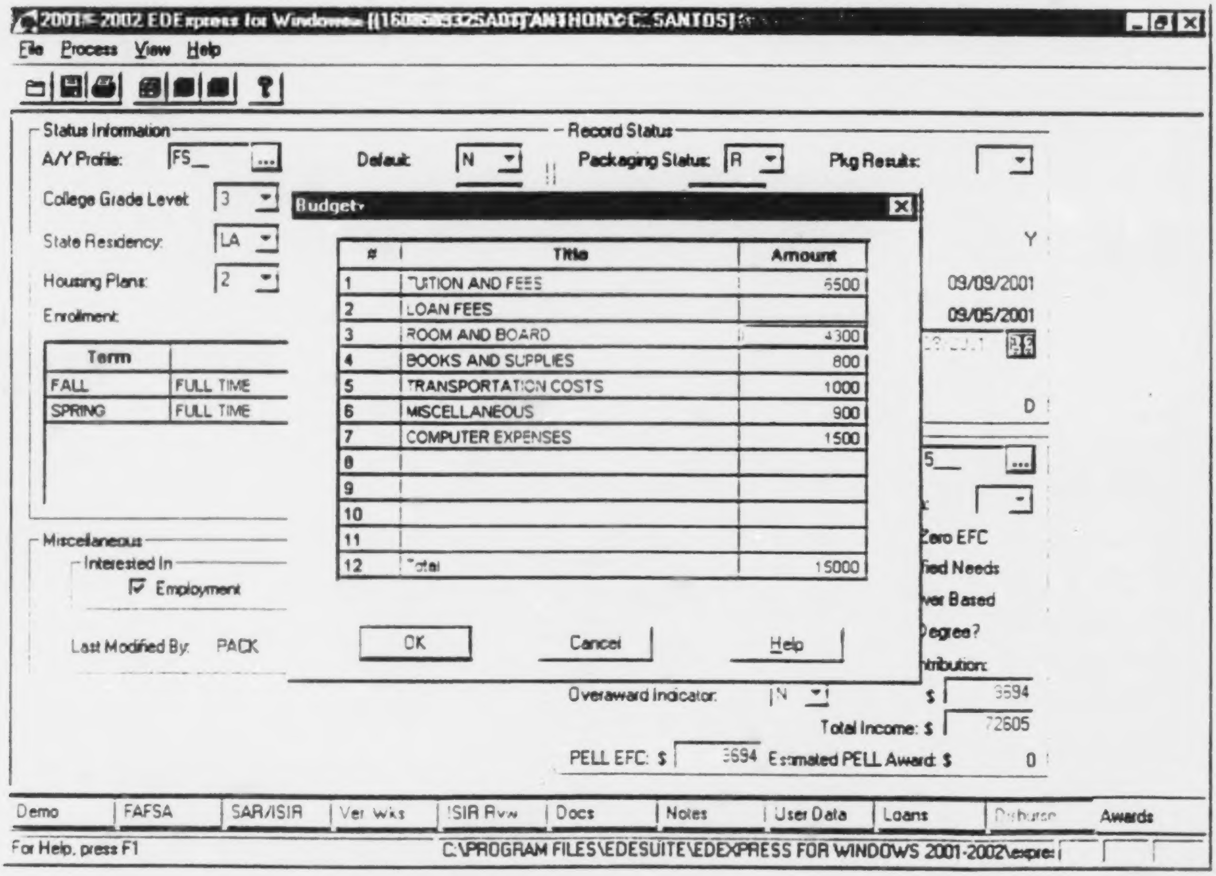
PELL EFC: $ 9694

Estimated PELL Award: $ 0

Change a Student's Budget: Instructor Demonstration

Let's look at two of the fields more closely, starting with the student's budget.

Step	Action
1	Click the **Budget** button to view the details of the budget assigned to the student according to the student's Budget Code.
2	The Budget dialog box displays the components and amounts of the budget assigned to this student. Click the **Loan Fees Amount** field, and press the **Delete** key to remove the loan fees from the student's budget. Note that you can delete User-defined Budget Components, but you can only zero out system-defined Budget Components.
3	Click **OK** to close the Budget dialog box. To save the change to the budget, click the **Save** icon, then **OK**. Click the **Close** icon to exit.



2001-2002 EDExpress for Windows - [(160869332SA01) ANTHONY C. SANTOS]

Status Information

A/Y Profile: FS__

College Grade Level: 3

State Residency: LA

Housing Plans: 2

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment

Last Modified By: PACK

Record Status

Default: N

Packaging Status: R

Pkg Results:

Y

09/09/2001

09/05/2001

D

5__

Zero EFC

fied Needs

ver Based

Degree?

ntribution:

Overaward Indicator: N

$ 3694

Total Income: $ 72605

PELL EFC: $ 3694 Estimated PELL Award: $ 0

#	Title	Amount
1	TUITION AND FEES	6500
2	LOAN FEES	
3	ROOM AND BOARD	4300
4	BOOKS AND SUPPLIES	800
5	TRANSPORTATION COSTS	1000
6	MISCELLANEOUS	900
7	COMPUTER EXPENSES	1500
8		
9		
10		
11		
12	Total	15000

For Help, press F1

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Lesson 3 Exercise

Instructions

Open a student's packaging record. Review the record and answer the questions below.

Review

1. Was the record you reviewed ready for packaging? ___________.

2. What was the Default status on the Packaging record that you reviewed? __________.

3. If the Default status on the Packaging record is set to Y, the system will not be able to package ___________________________ aid (type) for the student.

4. If a student has been packaged, you can view the detail of the aid awarded by clicking the ___________________________ button.

5. The field that indicates how the record was created is the ___________________________.

6. How was the record that you reviewed created? ____________.

7. A value of Y in the Overaward Indicator field indicates that the student's awards exceeds the student's ____________________________ .

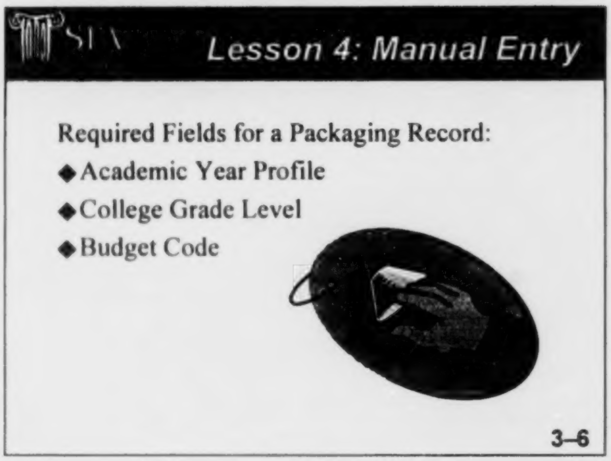
8. A Packaging Status of _______ indicates that the record is ready to be packaged.

9. A Packaging Status of _______ indicates that the record has been packaged by hand.

10. A Packaging Status of N indicates that the record ______________________________.

11. The Enrollment level in each term impacts only the student's __________________ award.

12. The value in the _____________________ field describes the student's academic progress.



Lesson 4: Manual Entry

Required Fields for a Packaging Record:

◆Academic Year Profile

◆College Grade Level

◆Budget Code

3–6

Lesson 4: Creating Packaging Data by Manual Entry

Occasionally, you may need to create a packaging record for a single student who won't be filing a FASFA. In this case, manual entry is probably the quickest method to create a single record or a small group of records.

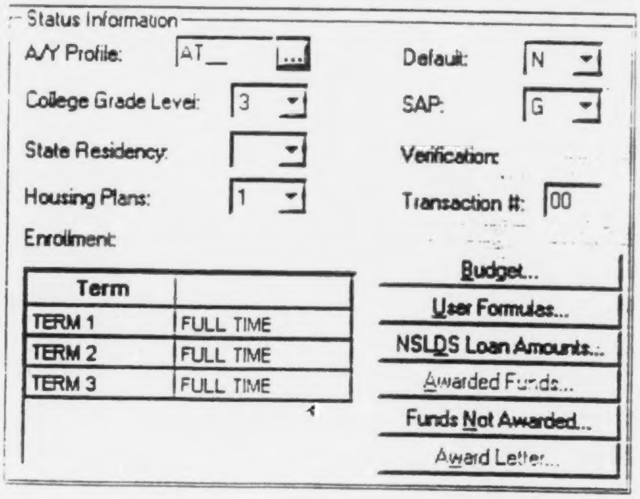
Just as with an ISIR import or external add import, your first step is to create a demographic record. Then, move to the Awards tab to update the fields required for the Packaging record:

- Academic Year Profile
- College Grade Level
- Budget Code

Creating Packaging Data by Manual Entry:

Instructor Demonstration

Step	Action
1	To create a new packaging record by manual entry: Select **File/New** from the menu bar. The New Student dialog box displays. Enter **121-21-2122** as the student's SSN. Click **OK.**
2	A blank demographic screen displays.
3	Enter in the various fields as much information as you have on the student. At a minimum, you must enter the student's name, **Ed Norton.**
4	Click the **Save** icon. Then click **OK.**
5	Click the **Awards** tab. The Awards tab screen displays. Notice the fields that are populated with default values previously defined in the various setups.
6	Click the **A/Y Profile** ellipsis button. Select the **AT AYP**. Click **OK.**
7	Click the **College Grade Level** down arrow and select **3.**
8	Click the **SAP** down arrow and select **G** (Good).



Status Information

A/Y Profile: AT__

College Grade Level: 3

State Residency:

Housing Plans: 1

Enrollment:

Term	
TERM 1	FULL TIME
TERM 2	FULL TIME
TERM 3	FULL TIME

Default: N

SAP: G

Verification:

Transaction #: 00

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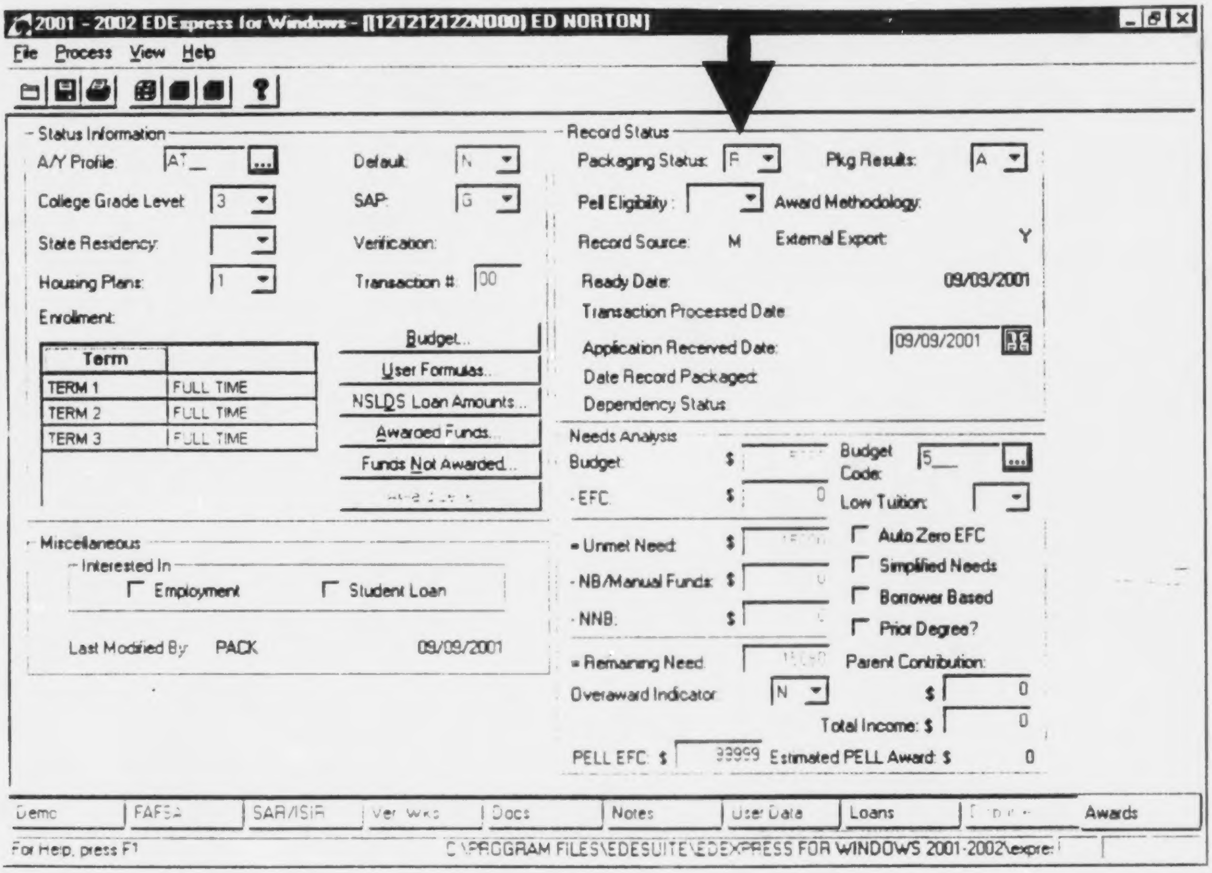
Creating Packaging Data by Manual Entry:

Instructor Demonstration (continued)

Step	Action
9	Click the **Budget Code** ellipsis button. Select **5** for Undergraduate Students. Click **OK**.
10	Click the **Save** icon. Click **OK**.
11	The Packaging Status updates to R. You're now ready to work with the student's award package. Click the **Close** icon.



2001 - 2002 EDExpress for Windows - [(121212122N000) ED NORTON]

Status Information

A/Y Profile: AT__

College Grade Level: 3

State Residency:

Housing Plans: 1

Default: N

SAP: G

Verification:

Transaction #: 00

Enrollment:

Term	
TERM 1	FULL TIME
TERM 2	FULL TIME
TERM 3	FULL TIME

Miscellaneous

Interested In

☐ Employment ☐ Student Loan

Last Modified By: PACK 09/09/2001

Record Status

Packaging Status: R

Pkg Results: A

Pell Eligibility:

Award Methodology:

Record Source: M

External Export: Y

Ready Date: 09/09/2001

Transaction Processed Date

Application Received Date: 09/09/2001

Date Record Packaged

Dependency Status

Needs Analysis

Budget $

- EFC $ 0

= Unmet Need $

- NB/Manual Funds $

- NNB $

= Remaining Need

Overaward Indicator: N

Budget Code: 5__

Low Tuition:

☐ Auto Zero EFC

☐ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

Parent Contribution: $ 0

Total Income: $ 0

PELL EFC: $ 99999

Estimated PELL Award: $ 0

For Help, press F1

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File
Process
View
Help
Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards

Lesson 4 Exercise

Instructions

Manually create and save a packaging record using a SSN and student's name that you make up. Use the Academic Year Profile and Budget Code that you set up in Session 2. Enter an EFC for the student. Answer the questions below.

Review

1. Name the three fields that must contain valid data in order for the student's record to be ready for packaging:

   ______________________________, ______________________________, and ______________________________.

2. What was Packaging Status before you saved the record? What was Status after you saved it?

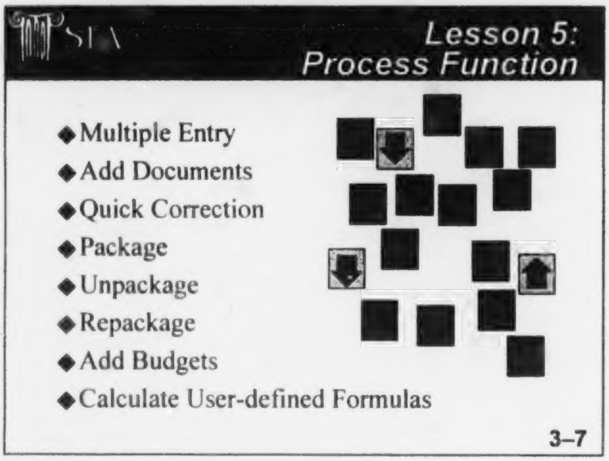
   ____

3. What are the fields that you had to enter on the Awards tab before you could save the record?

   ____

4. What is the Record Source?

   ____



Lesson 5:
Process Function

- ◆ Multiple Entry
- ◆ Add Documents
- ◆ Quick Correction
- ◆ Package
- ◆ Unpackage
- ◆ Repackage
- ◆ Add Budgets
- ◆ Calculate User-defined Formulas

3–7

Lesson 5: Process Function

Along with what you learned thus far about the various setups, you've been introduced briefly to another feature of EDExpress—Process. This feature allows you to perform batch processes and data entry for groups of students at one time. Before you begin working with student records, you should become familiar with this time-saving tool.

Generally, these Process functions impact only records in the packaging database.

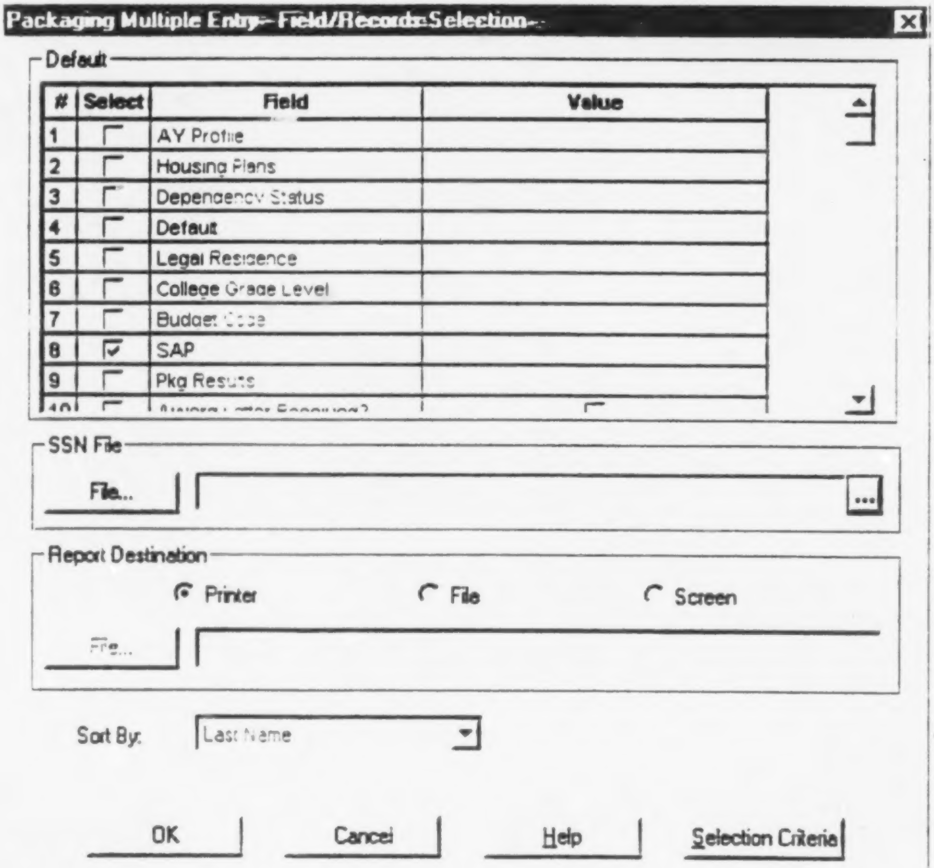
When you select Add Documents and Calculate User-defined Formulas, these functions automatically update all records in the Packaging database. The other functions allow you to select which student records you want to update by selecting a file, entering multiple social security numbers, or selecting a query.

Multiple Entry of SAP Data Values:

Instructor Demonstration

Let's review the steps to processing a Multiple Entry function for records in the Packaging database. In this example, we are going to update the SAP value for two students who have been suspended from receiving financial aid.

Step	Action
1	To access the Multiple Entry feature for the Packaging Module: Select **Process/Multiple Entry/ Packaging** from the main menu.
2	The Packaging Multiple Entry dialog box displays. Scroll down until you find the field you want to update. Click the Select box next to the field. In this case, select **SAP**.


Packaging Multiple Entry - Field/Records Selection
Default
SSN File
File...
Report Destination
File...
OK
Cancel
Help
Selection Criteria

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Plans	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	
9	☐	Pkg Results	

Report Destination: ● Printer ○ File ○ Screen

Sort By: Last Name

159

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Multiple Entry of SAP Data Values:

Instructor Demonstration (continued)

Step	Action
3	Click in the **Value** cell next to the SAP field. The click the **down arrow** to select the value you want to enter for the group of student records being updated. The SAP codes that were setup in Session 2 display. Select **S**, for Suspended.
4	Click **Screen** to route the report to the screen.
5	Select or enter the group of student records to be updated by using one of three methods: 1. Click File to display the listing of file names from which to select the one you want; 2. Click the ellipsis button and enter the SSN for each student record you want; or 3. Click Selection and select the query that specifies the group of students you want. In this case, click the **ellipsis button**.
6	Enter two Social Security Numbers: **007001970** and **035090081** Don't type the hyphens when entering the SSNs. Press the **Enter key** to add a line after entering the first SSN.
7	Click **OK** to exit.
8	Click **OK** a second time. The selected records display.
9	Click **Save**.
10	Another dialog box displays and asks you to verify that you want the records updated. Click **Yes**. Click **Yes** again to confirm.
11	When the records have been updated, a report displays. Review the report and click **Close** to exit.

Lesson 5 Exercise

Instructions

Using the Process/Multiple Entry function – suspend the following students for SAP.

160-85-0932

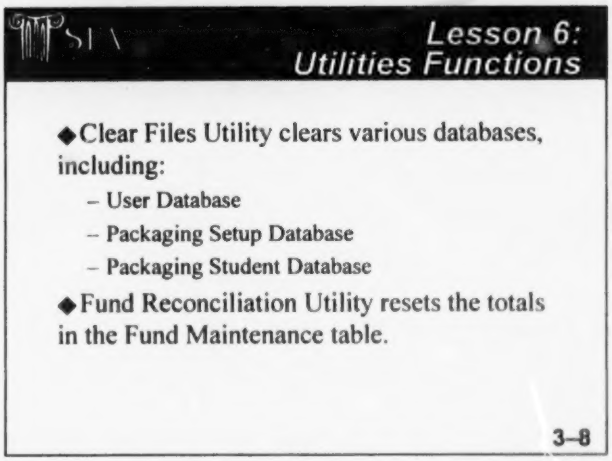
167-73-6707

Review

1. What are the names of the students you suspended?

2. Do you think entering the SAP values using this method took less time than it would have taken to open each individual student record and change the SAP value on the Awards tab?

3. List two or three other Packaging fields that you might enter using the Multiple Entry method.



Lesson 6: Utilities Functions

- ◆Clear Files Utility clears various databases, including:
  - – User Database
  - – Packaging Setup Database
  - – Packaging Student Database
- ◆Fund Reconciliation Utility resets the totals in the Fund Maintenance table.

3–8

Lesson 6: EDExpress Utilities Functions

Clear Files

As you practice importing and manually entering data, you may need to modify the various setups you created. You may also need to clear records from your database and start over.

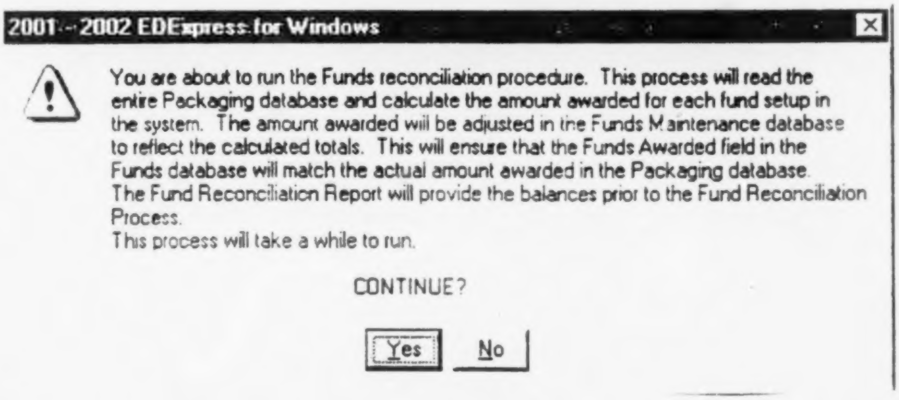
EDExpress has a Clear Files utility that allows you to clear files from the database of one or more its modules, such as the Packaging Database or the User Database.

Use the Clear Files utility with care, since it can delete the contents of the entire EDExpress database.

Fund Reconciliation

From time to time, the totals awarded from each fund in the Fund Maintenance table and the totals awarded to student records in the Packaging table get out of sync. To reconcile the totals awarded from these two tables, EDExpress includes a Funds Reconciliation function.

Running the process resets the totals in the Fund Maintenance table.



2001--2002 EDExpress for Windows

You are about to run the Funds reconciliation procedure. This process will read the entire Packaging database and calculate the amount awarded for each fund setup in the system. The amount awarded will be adjusted in the Funds Maintenance database to reflect the calculated totals. This will ensure that the Funds Awarded field in the Funds database will match the actual amount awarded in the Packaging database. The Fund Reconciliation Report will provide the balances prior to the Fund Reconciliation Process.
This process will take a while to run.

CONTINUE?

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Clear Files: Instructor Demonstration

Step	Action
1	To clear all records from database: Select **Tools/Utilities/Clear Files** from the menu bar. The Clear Files dialog box displays.
2	Click the **down arrow** in the Database Type text box to display the list of databases. Highlight the database you wish to clear. At this point, click **Cancel** because we don't intend to delete any of the databases used for this training.
3	If you were intent on deleting a database, you would click **OK** at this point to continue. EDExpress would prompt you twice to confirm that you wanted to remove all records from the database.

Lesson 6 Exercise

1. What is the purpose of the Clear files utilities of EDExpress?

2. Why should you use the Clear files utility with care?

3. When should you run the Funds reconciliation report?

Session 4: Document Tracking

Session 4—Document Tracking

Session 4 Objectives

- ◆Explain the use of Document Tracking before, during, and after Packaging
- ◆Add documents to student records using manual and automated processes
- ◆Modify, generate, and print the document tracking letter

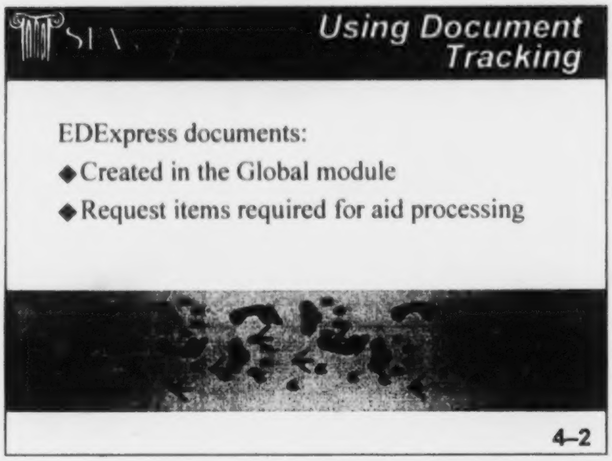
Key Terms

Verification

The CPS selects a certain percentage of FAFSAs, some randomly and others based on certain edit criteria, for data verification. Schools must verify certain data reported on these FAFSAs, using documentation provided by the student. (Many schools also choose to verify additional applications beyond those selected during processing.) For more information, see the Verification Guide.

Document Tracking Worksheet

Document tracking allows you to identify and manage documents required of students. The Document Tracking Worksheet helps you create the setups which define the conditions for adding documents to student records.



Using Document Tracking

EDExpress documents:

- ◆Created in the Global module
- ◆Request items required for aid processing

4–2

Document Tracking

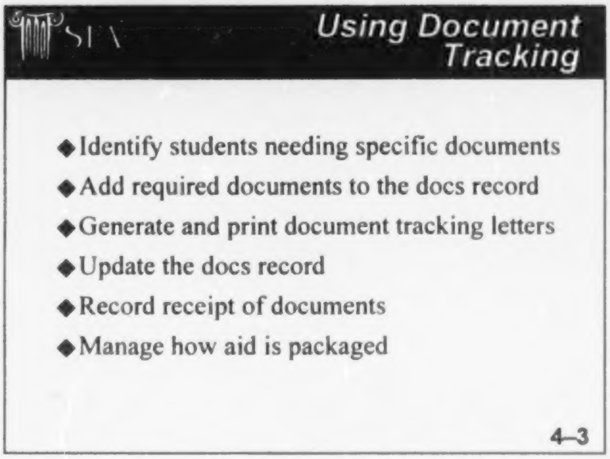
This feature of EDExpress allows users to manage the request for and receipt of documents required for financial aid processing. Although Document Tracking is a Global feature, in this session we examine its role in the Packaging process.

Using Document Tracking

Financial aid administrators routinely request student documents required to begin and complete the financial aid process. Depending on your school's process, you may need to track documents both before and after aid is packaged for your students. Examples of such documents include:

- Institutional or other aid application
- Copy of parent's or student's federal income tax return
- Verification worksheet
- Documentation of citizenship or eligible non-citizen status.

As we learned in Session 2, documents must be created in Global setup before they can be added to student records.



Using Document Tracking

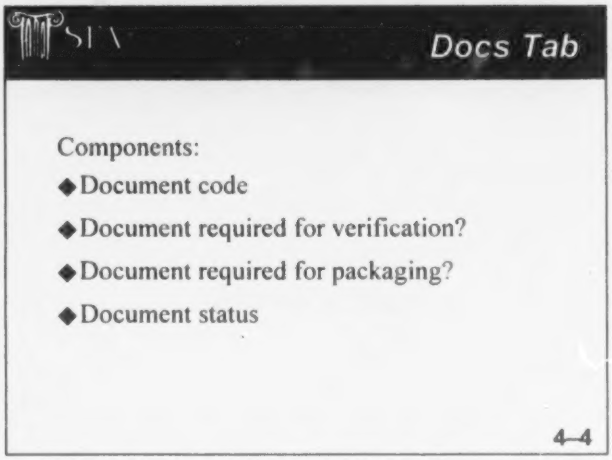
- ◆Identify students needing specific documents
- ◆Add required documents to the docs record
- ◆Generate and print document tracking letters
- ◆Update the docs record
- ◆Record receipt of documents
- ◆Manage how aid is packaged

4–3

Using Document Tracking (continued)

EDExpress document tracking allows you to:

- Identify students needing specific documents
- Add required documents to the student document tracking record
- Generate and print document tracking letters
- Update the docs record
- Record receipt of documents
- Manage how aid is packaged



Docs Tab

Components:

◆ Document code

◆ Document required for verification?

◆ Document required for packaging?

◆ Document status

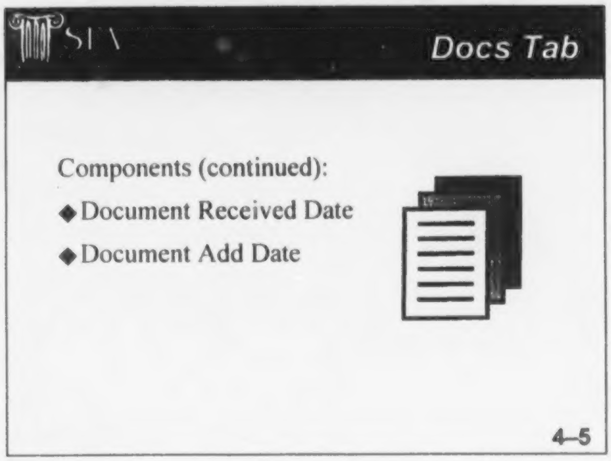
4-4

Docs (Document Tracking) Tab

The components of the Docs tab for a student record in EDExpress include:

- **Document Code**—Click the down arrow to display the list of available document codes.
- **Document Required for Verification?**—This checkbox is selected if the document is required for verification. A document required for verification is added to the Docs record during the Add Documents process only if the Pell Verification Status field on the demographic record is not equal to N.
- **Document Required for Packaging?**—This checkbox is selected if the document is required for packaging. The status of any document required for packaging must be updated to R (Received) or W (Waived) before the student's record can be packaged. Default values set for the Document Required for Verification and the Document Required for Packaging fields can be modified at the student record level.
- **Document Status**—Click the down arrow to display the list of document status codes. When the document status is updated to I (Incomplete), R (Received), or D (Received Not Reviewed), EDExpress automatically fills in the Document Receipt Date field.

I	Incomplete
N	Needed
R	Received
W	Waived
D	Received Not Reviewed



Docs Tab

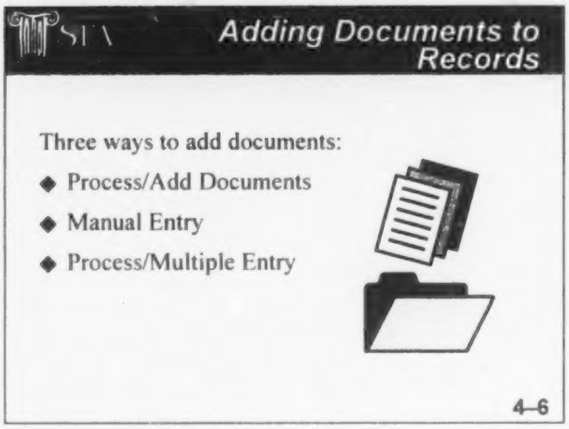
Components (continued):

- ◆ Document Received Date
- ◆ Document Add Date

4–5

Docs (Document Tracking) Tab (continued)

- **Document Received Date**—This field displays the date the document was received in MMDDCCYY format. If a number is 1 to 9, enter a zero in front of the number. For example, May 28, 2001 should be entered as 05/28/2001.
- **Document Add Date**—This is the date the document was added to the Document Tracking record. The system updates this field.



Adding Documents to Records

Three ways to add documents:

- Process/Add Documents
- Manual Entry
- Process/Multiple Entry

4-6

Adding Documents to Student Records

You can add documents to student records in three ways:

- **Process/Add Documents**—To assign documents to all student records that meet the criteria you specified for each document when you set up document tracking.
- **Manual Entry**—To manually update the Docs screen of an open student record.
- **Process/Multiple Entry**—To assign documents to students by entering specific Social Security Numbers or by selecting a query that identifies the student population you want.

It is important to note that the system will not add documents that are required for Packaging to student records having a Packaging Status of P (Packaged), M (Manually Adjusted), or H (Hand Packaged).

New!

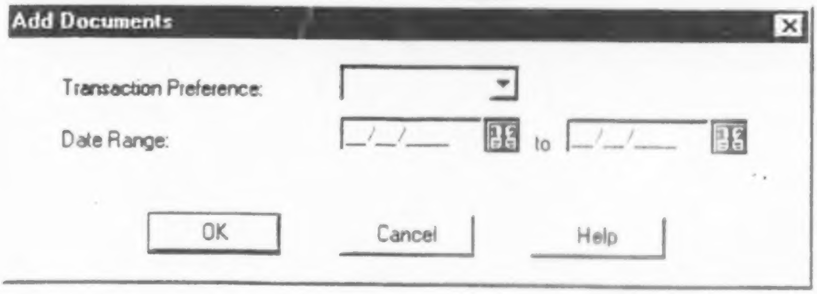
New for 2001-2002: When you select the Process/Add Documents option, EDExpress asks you to select the student's ISIR transaction to which you want to add the document: active or highest. Active is the transaction you marked as active. Highest is the transaction with the highest transaction number. The record must meet the criteria you defined for the document in Document Tracking setup before the document can be added to it. You can also use blank, which applies the document criteria to all ISIR transactions for each student and adds the document if the criteria match at least one transaction.

Process/Add Documents: Instructor Demonstration

In this example we demonstrate the Add Documents function. This will add documents to any student record that meets the conditions specified in Setup. For example, SS Reg will be added to any record that satisfies conditions we assigned in Session 2, Lesson 4.

Step	Action
1	To batch add documents to multiple student records: Select **Process/Add Documents** from the menu bar.
2	Click the down arrow for Transaction Preference and select whether you will add the documents to the student's active or highest transaction. In this case, select **Highest**.
3	You may also specify a range of dates. If Transaction Preference is Active or Highest, EDExpress compares the specified date range to the date the ISIR was added to the database. If Transaction Preference is blank, EDExpress compares the specified date range to the date the demographic record was created. In this case, leave the date range blank so that all records are updated, regardless of when they were created.
4	Click **OK**. The Add Documents process runs. Remember that the Add Documents function adds documents according to the queries created using fields from the App Express database or user-defined fields created in the Global database. So, if you want the query to select records without an ISIR, your query must include user-defined field(s) that you populate to identify those students.

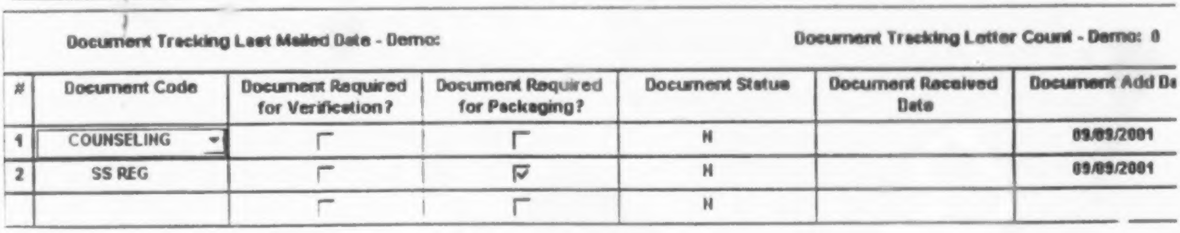
New!



Opening Document Tracking: Instructor Demonstration

To see the results of the Add Documents function, open a student's record.

Step	Action
1	Select **File/Open** from the menu bar. The open Student dialog box displays.
2	Click the **ellipsis** button. A list of records on your database displays.
3	Click the SSN of the record you want to open. In this case, click **664-64-6446**, the SSN for Peter Benton.
4	Click **OK**. The Open Student Dialog box redisplays. Click **OK** again.
5	The demographic record displays.
6	Click on the **Docs** tab at the bottom of the screen. The Student's Document Tracking screen displays.
7	The documents that apply to this record are displayed on the Document Tracking screen. If a document has been added using the Add Documents process but you do not need to request it from the student, set the Document Status flag to **W** for waived. Do not delete the document, since it will be added to the record again the next time you run the Add Document process. If you accidentally mark a document as received and save this update, to change the status back to N, highlight the date received, hit the delete key, then save the record. The status will reset to N.



Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add D
1	COUNSELING	☐	☐	N		09/09/2001
2	SS REG	☐	☑	N		09/09/2001
		☐	☐	N		

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Manual Entry: Instructor Demonstration

Let's review the steps for manually entering an Institutional Application that needs to be tracked for a student record. In this example, let's assume an incomplete institution application was received.

Step	Action
1	With the student's Doc tab open, click the **Document Code** down arrow in the blank row. Select the document code. In this case, select **Inst App**.
2	Click the down arrow in the **Document Status** field and select a status code. Select **I**. The valid codes are: N = Needed I = Incomplete R = Received W = Waived D = Received Not Reviewed
3	Click the **Save** icon to save your changes to the record.
4	A Record Updates Pending dialog box displays. Click **Yes**.
5	A Record Updates Saved dialog box displays. Click **OK**.
6	Click the **Close** icon to close the record.

Multiple Entry: Instructor Demonstration

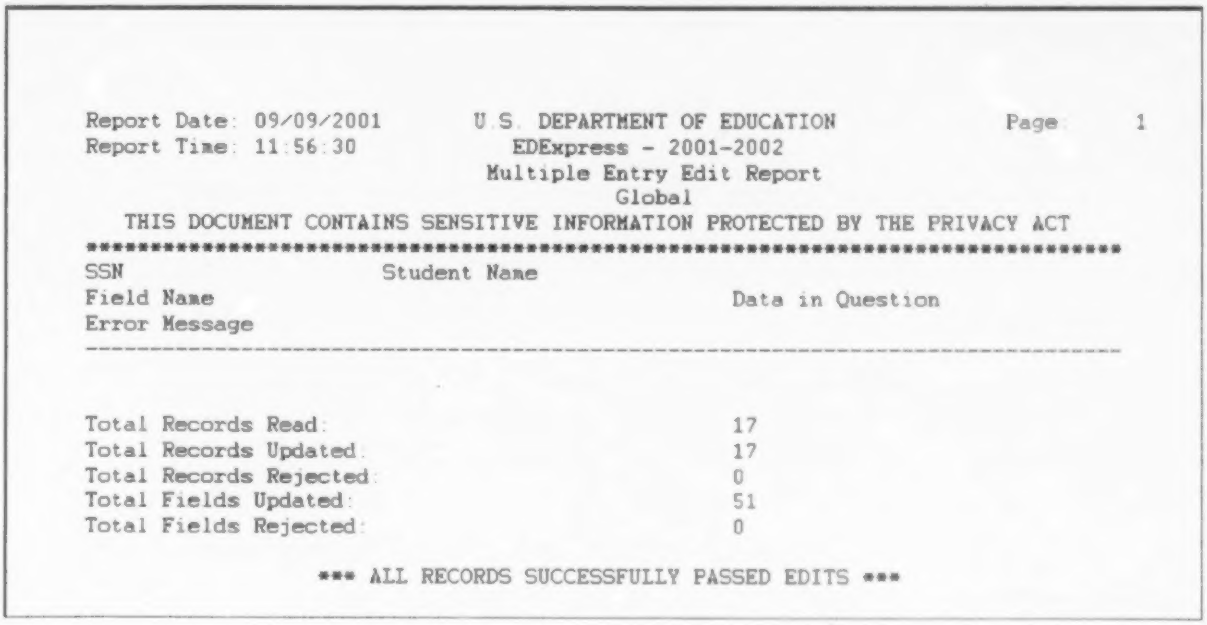
Another method of adding documents to multiple student records is the Multiple Entry function. Using the Multiple Entry function, you can add information or update various fields in document tracking (and other databases) for multiple records at one time.

In this example, we add an institutional application to records and indicate for each record that the document was received.

Step	Action
1	**To add documents and simultaneously update other data fields: Select Process/Multiple Entry/Global** from the menu bar.
2	The Global Multiple Entry dialog box displays. Click the **Select** checkbox for each field to update on all the records. In this case, mark **Document Code**. Document Status and Document Received Date are automatically marked.
3	Select the appropriate values: • Document Code of **Inst App** from the drop-down list. • Document Status of **R** from the drop-down list. • Document Received Date – System date automatically updates.
4	Click **Screen** as the Report Destination.
5	Click the **Selection Criteria** button.
6	The Selection Criteria dialog box displays. Choose a query or click the Select Records button to select from a list of records on your database. In this case, click the **Select Records** button.
7	The Select Records dialog box displays. Click the **Selected** checkboxes for the **first 17 records** to indicate the records you want to update. (You would click Select All to select all records in the list. If you accidentally select a record, click the checkbox again to deselect it. Click Deselect All to deselect all records on the list.) Click **OK**.
8	The Global Multiple Entry dialog box displays again. Click **OK**.

Multiple Entry: Instructor Demonstration (continued)

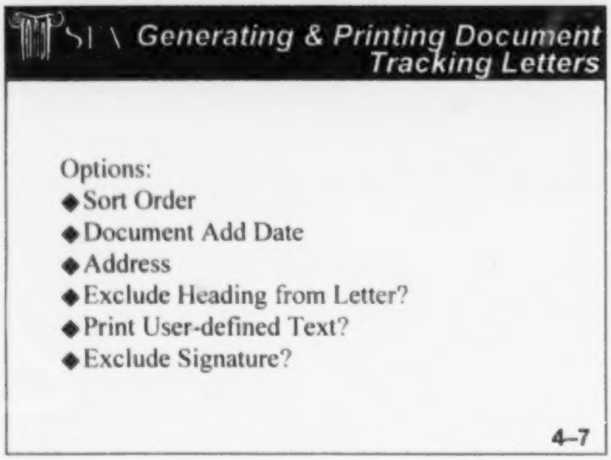
Step	Action
9	A list of the records you selected displays with the updated fields highlighted in blue. Click **Save**.
10	A Records Updates Pending dialog box displays. Click **Yes** to continue.
11	A second dialog box displays and asks you to verify the update for the number of records selected. Click **Yes** to update the records.
11	The Multiple Entry Edit Report shows the records that were updated, along with the total number of fields updated. When the system has updated the records, the edit report prints to the screen (or destination you selected). After you review the report, click the **Close** button.



```
Report Date: 09/09/2001        U.S. DEPARTMENT OF EDUCATION           Page:     1
Report Time: 11:56:30            EDExpress - 2001-2002
                               Multiple Entry Edit Report
                                         Global
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************
SSN                      Student Name
Field Name                                         Data in Question
Error Message
--------------------------------------------------------------------------------


Total Records Read:                                17
Total Records Updated:                             17
Total Records Rejected:                            0
Total Fields Updated:                              51
Total Fields Rejected:                             0

                  *** ALL RECORDS SUCCESSFULLY PASSED EDITS ***
```



Generating & Printing Document Tracking Letters

Options:
- ◆ Sort Order
- ◆ Document Add Date
- ◆ Address
- ◆ Exclude Heading from Letter?
- ◆ Print User-defined Text?
- ◆ Exclude Signature?

4–7

Generating and Printing Document Tracking Letters

Once documents are added to student records, you are ready to generate and print document tracking letters. EDExpress gives you several options to batch generate document tracking letters.

- **Sort Order**—Allows you to sort the batch by Social Security Number or Last Name.
- **Document Add Date**—Optional field allows to you generate letters based on the date documents were added to student records.
- **Address**—Allows you to select which address, local or permanent, to print on the letter.
- **Exclude Heading from Letter?**—Excludes the letter name and academic year, which prints centered at the top of the page.
- **Print User Defined Text?**—Includes the additional text you created in the Global System Setup as the first section or block of the document tracking letter text.
- **Exclude Signature?**—Allows you to exclude the system-defined closing at the bottom of the letter (i.e., Sincerely, Financial Aid Administrator).

It's very important to remember that when you print document tracking letters to either the printer or a file, the Document Tracking Letter Last Mailed Date field on the Docs tab updates. Once the field updates, you can't automatically generate another letter for this student until the number of days you indicated in the Global System Setup elapses. However, you could print one individually from within the student record.

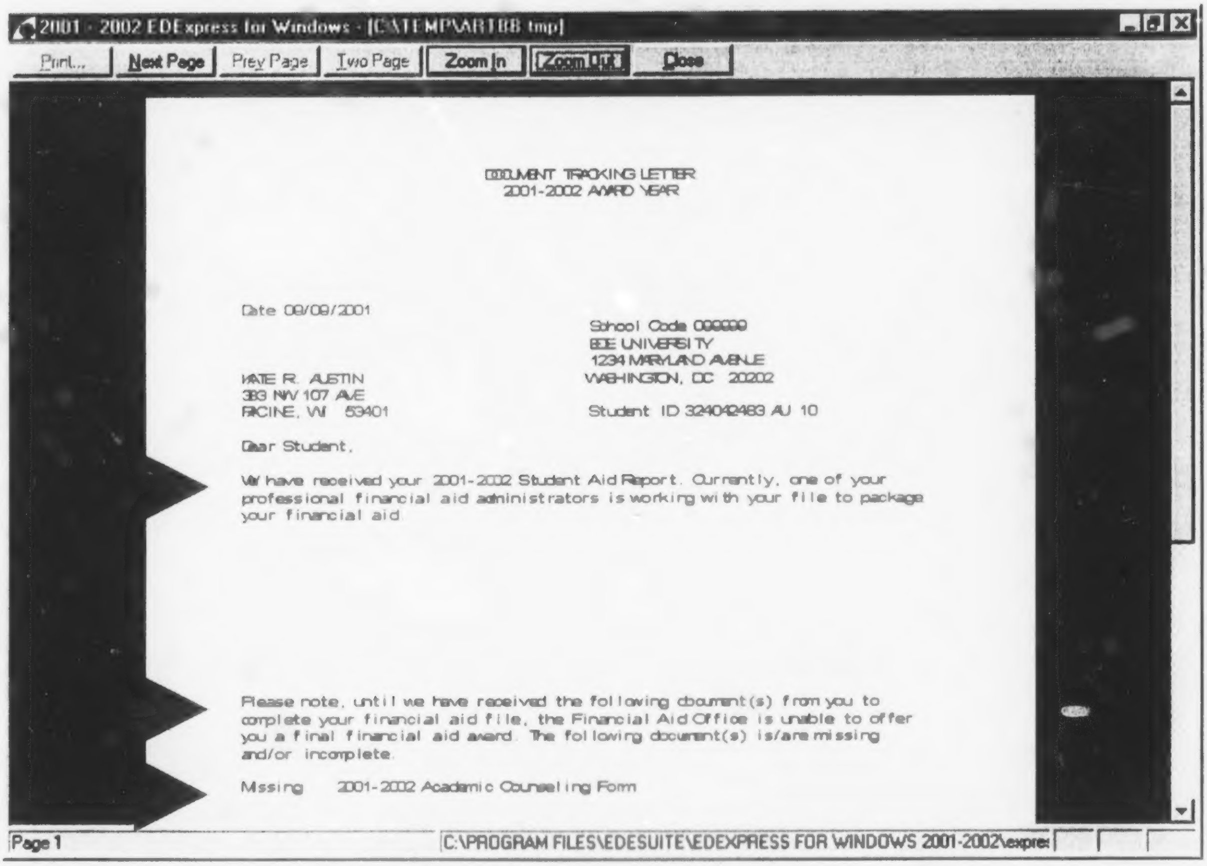
It's a good idea to first generate the letters to print to screen. Printing to screen allows you to view and verify the results. Then, repeat the process, but this time generate and actually print the letters to a file or printer.

Generating Document Tracking Letters:

Instructor Demonstration

In this demonstration, we print a document tracking letter that was set up in Session 2.

Step	Action
1	Select **File/Print** on the main menu bar.
2	Click the **Global** tab. Under Report, select **Document Tracking Letter**.
3	Click **Multiple** to print letters for more than one student.
4	Click **Screen** as the Report File Destination to view the letters on screen.
5	Click the **Sort Order** down arrow and select **Last Name** to sort by last name.
6	Leave the Address as Permanent.
7	Make sure the Print User-Defined Text? checkbox is marked to include the user-defined text created when you set up the Document Tracking letter.
8	Mark the **Exclude Signature?** checkbox.
9	If you want to generate document tracking letters according to the date documents were added, enter the appropriate date value in the Document Add Date field. In this case, skip the Document Add Date option.
10	Click **OK**.
11	The document tracking letter is divided into three parts, as shown on the following page. The first part includes any user-defined text you may have created. The second part includes EDExpress predefined text. The third part lists the documents that are missing.
12	Click **Close** when you finish viewing the letter.



DOCUMENT TRACKING LETTER
2001-2002 AWARD YEAR

Date 08/09/2001

School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON, DC 20202

KATE R. AUSTIN
383 NW 107 AVE
RACINE, WI 53401

Student ID 324042483 AU 10

Dear Student,

We have received your 2001-2002 Student Aid Report. Currently, one of your professional financial aid administrators is working with your file to package your financial aid.

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing 2001-2002 Academic Counseling Form

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expres

Note: the space for text block 1 is hard coded. For a more professional appearance, you may want to develop enough text to fill the space. Some schools print the letters to a file and modify the letter using their word processing software.

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Session 4 Exercise

Instructions

Enter documents using one or more of the three methods. Then, print one or more document tracking letters to the screen.

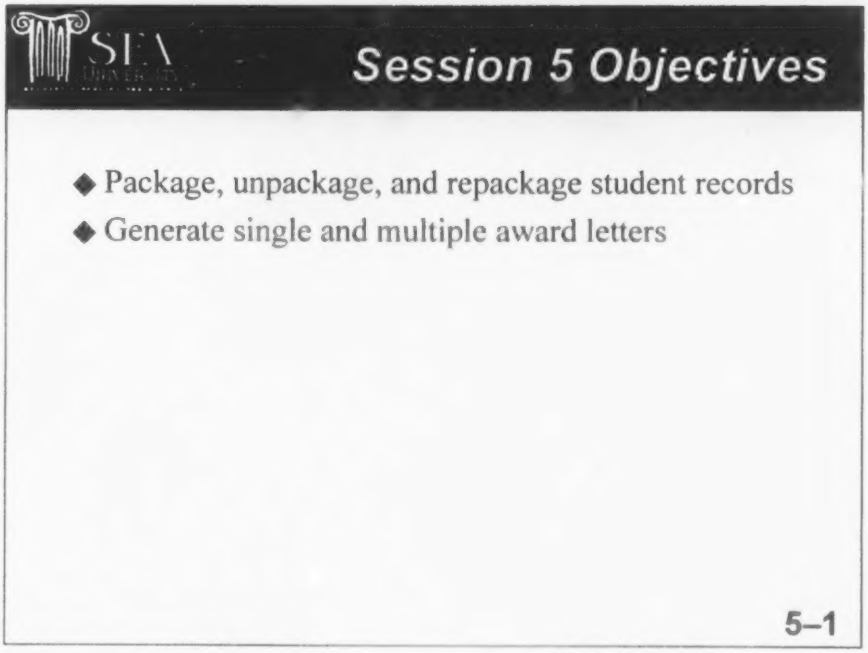
Review

True of False:

1. ________ The system will automatically add documents required for packaging to records having a Packaging Status of P, M, or H.
2. ________ EDExpress gives you the ability to add document records to the student's highest transaction, active transaction, or all transactions.
3. ________ If you receive a document from a student you would update the student record using the Document Status code R.
4. ________ You could use the Add Documents function to add a US tax return to all student records that had been selected for verification.
5. ________ You could use the Multiple Entry function to assign a US tax return and a Document Status of N (Needed) to all student records that had been selected for verification.
6. ________ You can print document tracking letters in zip code order.
7. ________ When you print the document tracking letter to either a printer or file you can't generate another letter for this student until the number of days you indicated in the Global System Setup elapses.

Session 5: Working with Student Awards

Session 5—Working with Student Awards



Session 5 Objectives

- Package, unpackage, and repackage student records
- Generate single and multiple award letters

5–1

Key Terms

Award Methodology

In the award methodology profile, you can establish methodologies for determining the manner in which various funds are awarded to students. A methodology dictates which funds and what amounts are allocated to a student. Each methodology has a unique code and priority.

You can create up to 999 methodologies to package selected groups of students.

The Packaging process reads the award methodology database to determine which methodology to use for packaging a given student. If the student meets the criteria of a given methodology, that methodology is used to package the student. This changes the Packaging Status code to a P. If a student meets the criteria for a methodology but is not awarded funds by that methodology in addition to Pell, the reasons are noted in the Funds Not Awarded table on the student record and the system searches for the next methodology for which the student meets the criteria.

The packaging process will use each methodology for which the student meets the qualification criteria until the student is awarded funds by a methodology in addition to their Pell eligibility. If the packaging process uses every methodology for which the student meets the criteria, yet the student still does not receive any awards, then the last methodology ran through the process is stored as the Award Methodology for the student.

Gift Aid:

Financial aid that a student is not required to repay or earn through employment. Generally, gift aid is in the form of a grant or scholarship.

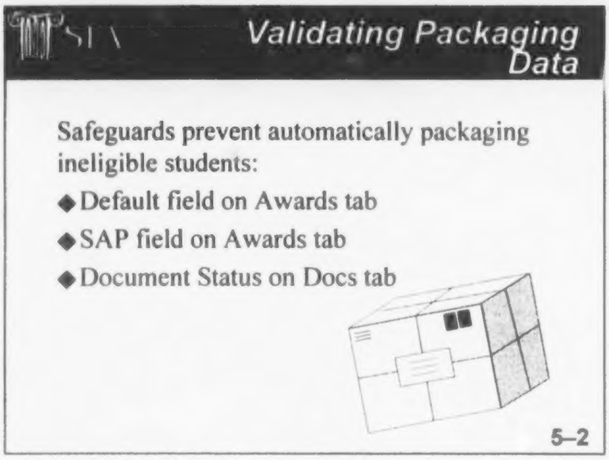
SAP (Satisfactory Academic Progress)

Every school participating in the SFA Programs must monitor its SFA recipients to ensure that they are meeting satisfactory progress standards. Each school must develop reasonable standards for measuring academic progress, which must contain elements specified in the regulations.

A school's satisfactory progress policy for students receiving SFA funds must be at least as strict as the policy used for students who do not receive SFA funds. The policy must be applied consistently to all SFA recipients within identifiable categories of students (such as full-time or part-time, graduate, or undergraduate students). Note that the school's satisfactory progress policy must include both a qualitative measure (such as the use of cumulative grade point average) and a quantitative measure (such as a maximum time frame for completion) of the student's progress.

Self-Help Aid:

Student financial aid that must be earned or repaid.



Validating Packaging Data

Safeguards prevent automatically packaging ineligible students:

- ◆Default field on Awards tab
- ◆SAP field on Awards tab
- ◆Document Status on Docs tab

5–2

Once you create student packaging records in the Packaging database, you are ready to award or package financial aid for your eligible students. After your students are packaged, you still have more work to do. You must generate award letters, monitor and revise financial aid packages as information about your students changes, track documents that are needed to complete files, disburse the aid to your Business Office, generate reports to help you manage or administer your school's financial aid budget, and complete other tasks.

Validating Packaging Data

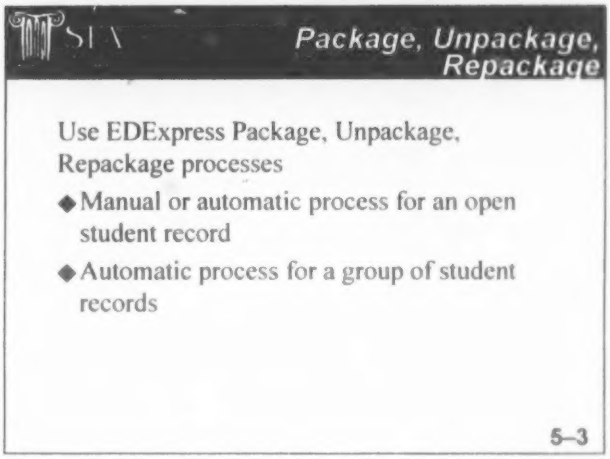
Before EDExpress allows you to award financial aid, certain data fields in the student's packaging record must be populated. In addition, the system checks the values in certain fields to verify that the student is eligible to be awarded financial aid. The EDExpress features that prevent you from automatically or manually packaging students who are ineligible include:

- Default field on Awards tab
- SAP field on Awards tab
- Document Status on Docs tab

Each of these components is described in the table on the following page.

Safeguards to Prevent Automatically Packaging Ineligible Students

Component	Description
Default Value	**For a student who is in loan default or owes a grant overpayment,** change the Default value to Y (Yes) to prevent federal aid from being packaged.
SAP Value	For a student not making satisfactory academic progress, populate the SAP field with a SAP code set up with the No Packaging Flag. Assigning any SAP code having the No Packaging Flag prevents all types of aid from being packaged.
Document Status	Documents are assigned to student records automatically (according to how the document was created) or manually. In either case, the values in each of the columns listed below can be changed manually. If any document is required for packaging, the system prevents all types of aid from being packaged automatically as long as the Document Status is N (Not Received) or I (Incomplete).



Package, Unpackage, Repackage

Use EDExpress Package, Unpackage, Repackage processes

◆ Manual or automatic process for an open student record

◆ Automatic process for a group of student records

5–3

Creating and Modifying Financial Aid Packages

Let's review the methods you can use to create or package financial aid awards:

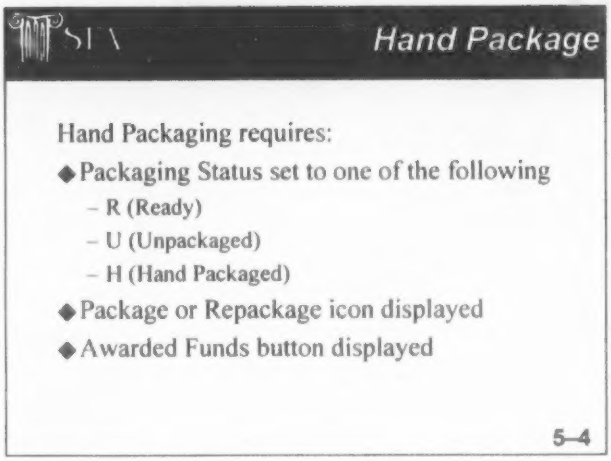
- Working with one student record at a time, you can hand package the awards.
- Working with one student record at a time, have the EDExpress system package funds based on your Award Methodologies.
- Working with groups of students, have the EDExpress system package funds based on your Award Methodologies.

As you know from experience, award packages often need to be modified for many reasons. Students decline aid offered; they request different loan amounts; their eligibility changes; or funding levels change.

EDExpress provides several tools or functions to help manage the ongoing award process:

- **Package**—Awards funds on the Selection Criteria and priority order of Award Methodologies.
- **Unpackage**—Undoes the Package process.
- **Repackage**—Recomputes the entire aid package based on changes to the student's demographic or financial data, the award methodology, or fund parameters that have been saved to the database prior to running the Repackaging process.

Each of these tools can be used to work with either a single student record or a group of records.



SFA **Hand Package**

Hand Packaging requires:

- Packaging Status set to one of the following
  - R (Ready)
  - U (Unpackaged)
  - H (Hand Packaged)
- Package or Repackage icon displayed
- Awarded Funds button displayed

5–4

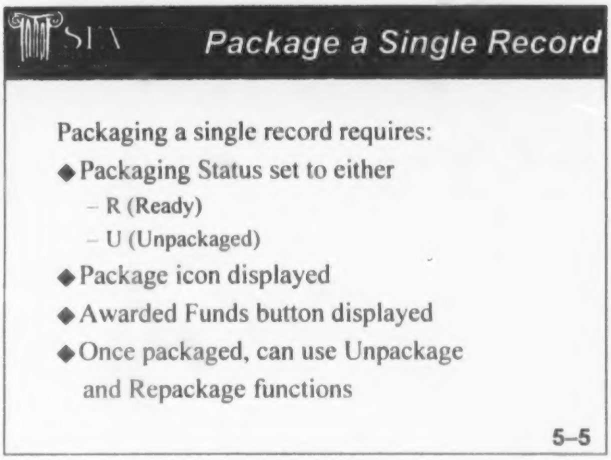
Hand Packaging Process

The Hand Packaging feature allows you to manually package a student's record by adding award amounts in the Awarded Funds dialog box. Examples of when you must use this feature include:

- You have a few students who do not meet any award methodology criteria.
- You need to award institutional, state, or outside non-need based aid to students who have little or no need.
- You need to add a scholarship to the student's package.
- You need to revise the amount of a student's loan.
- You need to override some value that prevents the record from being packaged in batch Process/Package.

In order to hand package a record, the following are required:

- The packaging Status must be R (Ready), U(Unpackaged), or H (Hand Packaged);
- Either the Package or repackage icon must display; and,
- The Awarded Funds button must display.



Package a Single Record

Packaging a single record requires:

- Packaging Status set to either
  - R (Ready)
  - U (Unpackaged)
- Package icon displayed
- Awarded Funds button displayed
- Once packaged, can use Unpackage and Repackage functions

5–5

Package Function: Single Record

Each of the Package, Unpackage, and Repackage processes can be run to work with a single student record or a group of records. To work with a single student record, the process you follow is similar to Hand Packaging:

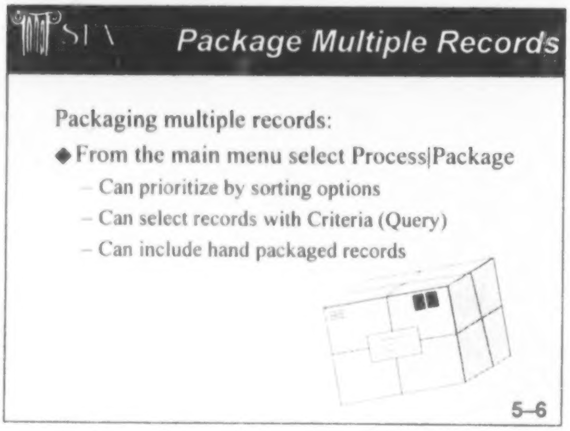
- The packaging Status must be R (Ready), U(Unpackaged), or H (Hand Packaged);
- Either the Package or repackage icon must display; and,
- The Awarded Funds button must display.

Unpackage

Use the Unpackage function to remove the student's awards. You can use the Unpackage feature if you inadvertently package the wrong student or group of students. Note that Unpackage removes all awards except outside resources (Aid Type O) and funds that you have designated in Funds Maintenance not to be removed.

Repackage

Use the Repackage feature when you want to revise the student's package based on new information. For example, changes to the ISIR may result in a different EFC calculation and impact the student's need. Note that Repackaging does not remove awards from outside resources (aid type O) and funds that you have designated in Funds Maintenance not to be removed.



Package Multiple Records

Packaging multiple records:

◆ From the main menu select Process|Package
  - Can prioritize by sorting options
  - Can select records with Criteria (Query)
  - Can include hand packaged records

5–6

Package Function: Multiple Records

Generally, working with multiple records at one time is the most efficient way to package aid. The Package, Unpackage, and Repackage options of the EDExpress batch Process function allow you to do this. Under Process, you can work with all records or a selection of records from the Packaging database by following the same basic steps as you did when working with an open student record.

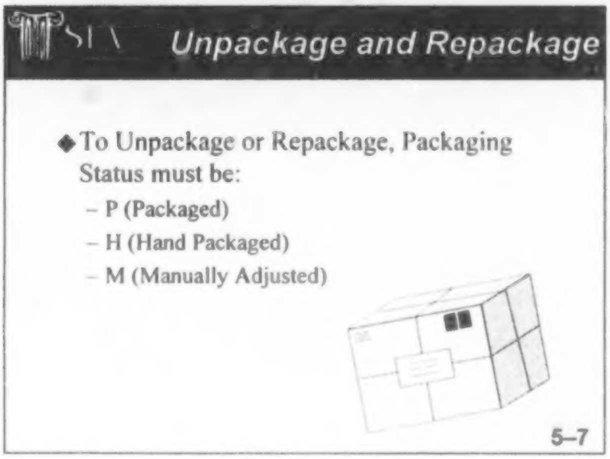
New!

The Process/Package function allows you to sort or prioritize the order in which students will be packaged. If you enter dates in the Priority Date Range fields, EDExpress searches for records that were created within those dates. (Note that this is a new feature for 2001-2002; last year's software included a single date field titled Priority Date.)

EDExpress allows you up to five more sorting options that can be used with or without the Priority Deadline Date sort. These include sorts by EFC, Application Received Date, Transaction Processed Date, Ready Date, and User-defined Date. When setting the priority, you have the option of including or excluding hand packaged records

You can also select certain records to package by making use of queries. The following are examples of queries you might want to create and use when packaging students:

- Records which meet the conditions of a certain Award Methodology;
- Records with an automatic zero EFC; and
- Records for a selected grade level.



Unpackage and Repackage

- To Unpackage or Repackage, Packaging Status must be:
  - P (Packaged)
  - H (Hand Packaged)
  - M (Manually Adjusted)

5–7

Unpackage Function: Multiple Records

The process for unpackaging multiple records is similar to the process for packaging multiple records. One difference is that you have the option to include or exclude previously manually adjusted packages and/or hand packaged records.

Repackage Function: Multiple Records

The process for repackaging multiple records is similar to the process for packaging multiple records. Just as with the Unpackage function, you have the option to include or exclude manually adjusted packages and/or hand packaged records.

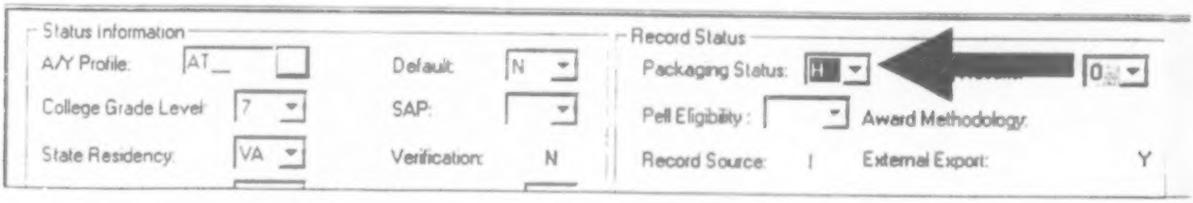
The Packaging Status code must be one of the following before you can unpackage or repackage multiple records:

- P (Packaged
- H (Hand Packaged)
- M (Manually Adjusted)

Hand Package: Instructor Demonstration

Let's walk through the steps of hand packaging a student whose record was added with the ISIR import.

Step	Action
1	Select **File/Open** from the menu bar.
2	Type **115-63-5416**, the SSN for **Richard Cage**. Click **OK**.
3	The demographic record appears. Click the **Awards** tab.
4	Make sure that the required fields are entered: **A/Y Profile, College Grade Level, and Budget Code**. Enter **O**, for Offered, in the **Pkg Results** field.
5	Click the **Save** icon, then click **OK**. The Packaging Status Code should be R.
6	Click the **Awarded Funds** button. The Awarded Funds dialog box appears. On the first blank row, click the first empty field under **Code** to display the drop-down list of available funds. Select **School.** Enter **1000** as the award amount for each of the terms.
7	Click **OK** to return to the Packaging record.
8	Update the Packaging Status to **H** (Hand Packaged).
9	Click the **Save** icon to save the award. When you save the award: the Awarded Funds value updates, the Remaining Need value updates, the Package icon is grayed out and the Unpackage and Repackage icons display.
10	Click **OK**.
11	Click the **Close** icon to exit.



Status Information

A/Y Profile: AT__

College Grade Level: 7

State Residency: VA

Default: N

SAP:

Verification: N

Record Status

Packaging Status: H

Pell Eligibility :

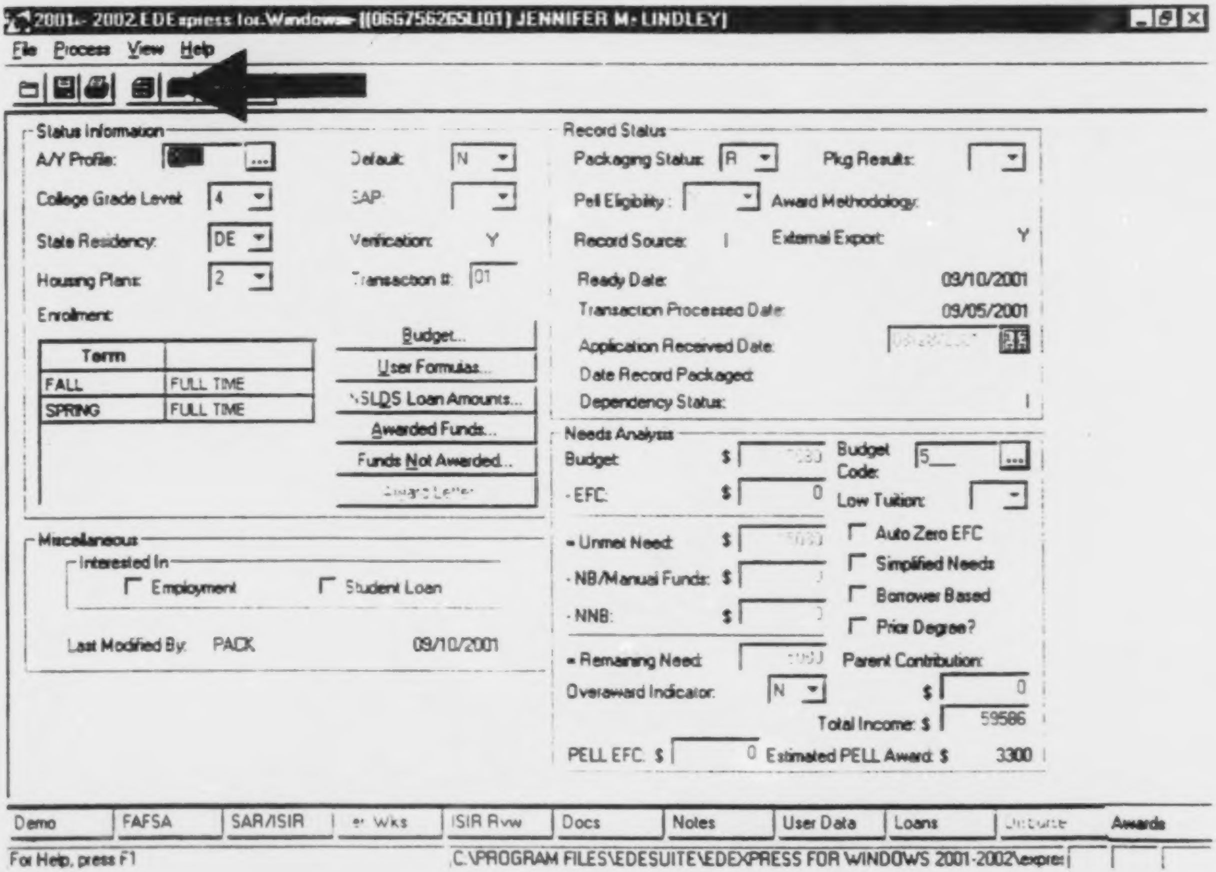
Award Methodology:

Record Source: I

External Export: Y

Package a Single Record: Instructor Demonstration

Step	Action
1	To have the system package a student record, open the record by selecting **File/Open** from the menu bar.
2	Enter **066-75-6265**, the SSN for **Jennifer Lindley**. Click **OK.**
3	The demographic record displays. Click the **Awards** tab.
4	Verify that the Packaging Status is R, Ready to Package. Then, click the **Package** icon (green box) on the toolbar.
5	A Student Packaged dialog box displays. Click **OK**. A Record Updates Saved dialog box displays. Click **OK**.


File
Process
View
Help
Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Award Letter
Demo
FAFSA
SAR/ISIR
Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Disburse
Awards

2001 - 2002 EDExpress for Windows - [(066756265LI01) JENNIFER M. LINDLEY]

Status Information
A/Y Profile:
College Grade Level: 4
State Residency: DE
Housing Plans: 2
Default: N
SAP:
Verification: Y
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment ☐ Student Loan
Last Modified By: PACK 09/10/2001

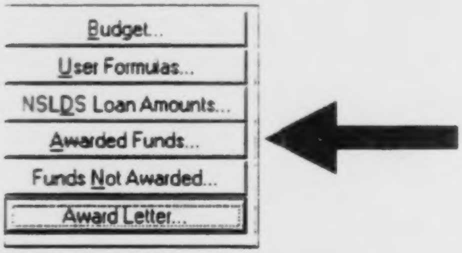
Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 09/10/2001
Transaction Processed Date: 09/05/2001
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $ [illegible]
Budget Code: 5
- EFC: $ 0
Low Tuition:
= Unmet Need: $ [illegible]
- NB/Manual Funds: $ [illegible]
- NNB: $ [illegible]
= Remaining Need: [illegible]
Overaward Indicator: N
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 59586
PELL EFC: $ 0
Estimated PELL Award: $ 3300

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

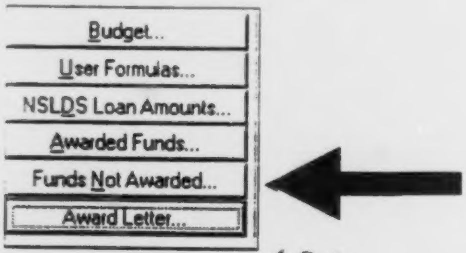
Manual Changes: Instructor Demonstration

Step	Action
1	To manually change awards for an open student record: Click the **Awarded Funds** button.
2	This dialog box shows the funds that were awarded. Change the **FWS** award to **$0** in each term. Click **OK**.
3	Click the **Save** icon.
4	A Record Updates Saved dialog box displays. Click **OK**.


Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Award Letter...

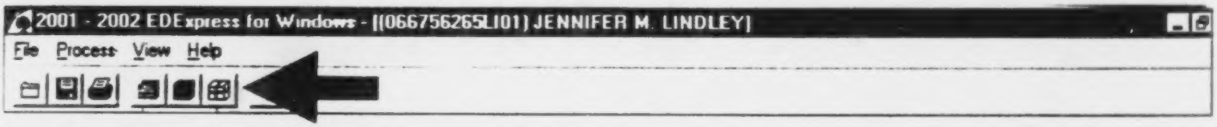
Funds Not Awarded: Instructor Demonstration

Step	Action
1	To review funds not awarded by the Methodology: Click the **Funds Not Awarded** button.
2	Click **OK** when you have completed reviewing the information. Note that if all funds tied to the Need Methodology were awarded, the No Records Selected dialog box displays. However, if funds had not been awarded, a Funds Not Awarded dialog box displays the fund code(s) not awarded and the reason(s).


Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Award Letter...

Repackage Student Record: Instructor Demonstration

Step	Action
1	Change Jennifer Lindley's **College Grade Level** to **1**, for 1st year undergraduate, attended college before. Then change her **Budget Code** to **4**, 1st year undergraduate on campus.
2	Click the **Repackage** icon (yellow box) on the toolbar. Remember that the record must have a status of P, H, or M.
2	A Student Repackaged dialog box displays Click **OK**. A Record Updates Saved dialog box displays. Click **OK** again to save the update.
3	The Unpackage and Repackage icons display. The various fields have been recalculated and/or updated.

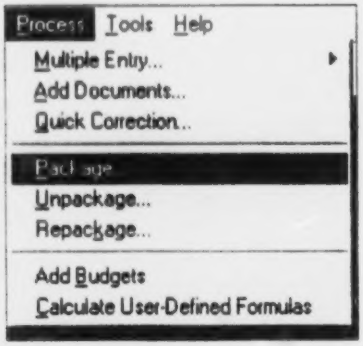

2001 - 2002 EDExpress for Windows - [(066756265LI01) JENNIFER M. LINDLEY]
File
Process
View
Help

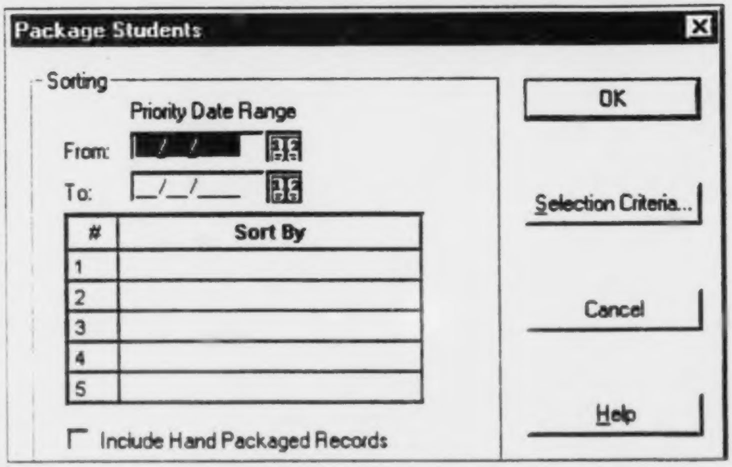
Unpackage Student Record: Instructor Demonstration

Step	Action
1	Click the **Unpackage** icon (red box) on the toolbar.
2	A Student Unpackaged dialog box displays. Click **OK**.
3	A Records Updates Saved dialog box displays. Click **OK** again to save the update.
4	The Package icon displays. The various fields are recalculated and/or updated. Remember that the Unpackage process removes all awards **except** outside resources (aid type O) and the funds you designated not to be removed in setup.
5	Click the **Close** icon.

Package Multiple Records: Instructor Demonstration

Step	Action
1	To package multiple student records, click **Process/Package** from the menu bar.
2	The Package Students dialog box displays. Click the calendar if you wish to select the Priority Date Range. In this case, leave it blank.
3	Click the Sort By field to display the drop-down list if you wish to use the Sort option. In this case, leave it blank.
4	Click **Selection Criteria** to specify the group of students you want. The Selection Criteria dialog box displays.
5	Click the ellipsis button to display a list of available queries in the Packaging database. Select **Graduate Students** as the query. Click **OK**. Click **OK** again.
6	The Package Students dialog box displays. Skip the Include Hand Packaged Students option. Click **OK** to begin the process.
7	A processing dialog box displays as the process runs. When complete, another dialog box displays to indicate the number of student records packaged. Click **OK**.
8	A Print Packaged Student List? dialog box displays. If you click Yes, a listing of names and Social Security Numbers for the packaged students prints to your printer. In this case, select **No.**


Process
Tools
Help
Multiple Entry...
Add Documents...
Quick Correction...
Package
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas


Package Students
Sorting
Priority Date Range
From: / /
To: _/_/___
#
Sort By
1
2
3
4
5
☐ Include Hand Packaged Records
OK
Selection Criteria...
Cancel
Help

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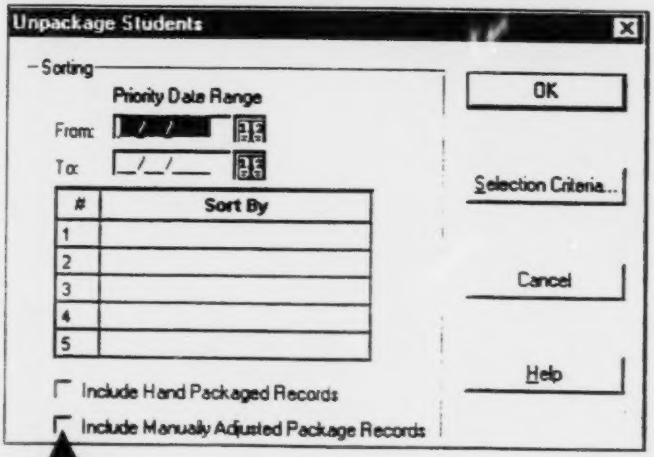
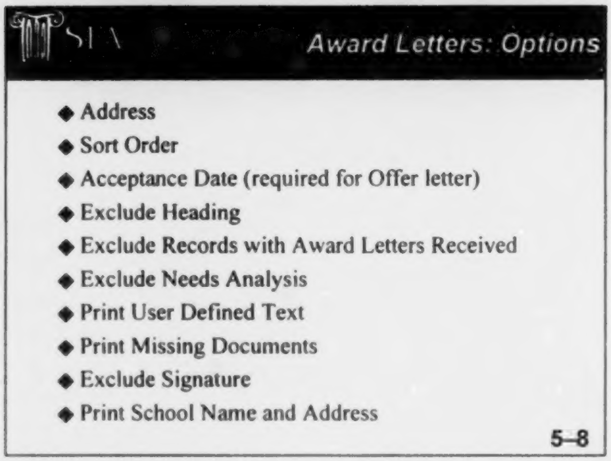
Unpackage Multiple Records Function: Instructor Demonstration

Step	Action
1	To Unpackage multiple student records: Click **Process/Unpackage** from the menu bar.
2	The Unpackage Students dialog box displays. Click the calendar if you wish to select the Priority Date Range. In this case, leave it blank.
3	Click the Sort By field to display the drop-down list if you wish to use the Sort option. In this case, leave it blank.
4	Click **Selection Criteria** to specify the group of students you want. The Selection Criteria dialog box displays.
5	Click **Select Records** to display the Records in the database. Select the first two records on the list. Click **OK**.
6	The Unpackage Students dialog box displays. Skip the Include Hand Packaged Students option. Click **OK** to begin the process. You have the option to include or exclude previously manually adjusted packages or hand packaged records. Remember: This option to exclude previously manually adjusted packages doesn't apply when you repackage a single open student record.
7	A processing dialog box displays as the process runs. When complete, another dialog box displays to indicate the number of student records packaged. Click **OK**.


Unpackage Students
Sorting
Priority Date Range
From: _/_/___
To: _/_/___
#
Sort By
1
2
3
4
5
☐ Include Hand Packaged Records
☐ Include Manually Adjusted Package Records
OK
Selection Criteria...
Cancel
Help



Award Letters: Options

- Address
- Sort Order
- Acceptance Date (required for Offer letter)
- Exclude Heading
- Exclude Records with Award Letters Received
- Exclude Needs Analysis
- Print User Defined Text
- Print Missing Documents
- Exclude Signature
- Print School Name and Address

5–8

Working with Award Letters

After packaging students, award letters must be generated and printed. Also, depending on the type of default award letter (Offer or Notification) you select in Packaging System Setup, you may need to track the student's return/acceptance of the award letter. EDExpress gives you several options to batch generate award letters for the students you package.

- **Address**—Allows you to select either the local or permanent address to print on the letter.
- **Sort Order**—Allows you to sort the batch by last name, Social Security Number, or zip code.
- **Acceptance Date**—Required field for Offer letters that indicates the deadline date by which the student is to accept the financial aid award.
- **Exclude Heading from Letter?**—Excludes the letter name and academic year, which print centered at the top of page.
- **Exclude Records with Award Letters Received?**—When generating multiple letters, this option allows you to exclude award letters already marked as received in the students' records.
- **Exclude Needs Analysis?**—Excludes the needs analysis from printing on the award letter.
- **Print User Defined Text?**—Includes the additional text you created in the Global System Setup up as a cover page to the award letter.
- **Print Missing Documents?**—Includes a third page that advises students that the award letter is an offer until the documents listed as missing or incomplete are received.
- **Exclude Signature?**—Allows you to exclude the system-defined closing at the bottom of the letter (i.e., Sincerely, Financial Aid Administrator).
- **Print School Name/Address?**—Allows you to include your school's name and address at the upper right side of the page.

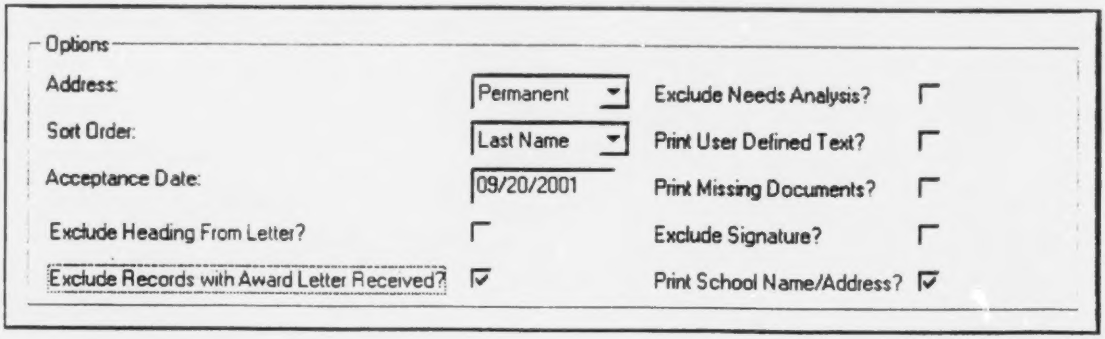
Select the options that best fit the student population for which letters are being generated.

Generating Multiple Award Letters:

Instructor Demonstration

Generating and printing award letters takes planning. Keep in mind your goal as you plan the process. It may be more efficient for you to batch generate award letters according to student populations. For example, because you would not want to include the need analysis on the award letters of those students who will not file the FAFSA, you might want to generate their letters separately. To generate letters for students who will not file the FAFSA separately from those who have, simply create a parameter query that lets you select on the field Record Source. This allows you to use the same query for either population.

Step	Action
1	Select **File/Print** on the menu bar.
2	Click the **Packaging** tab.
3	Under Report, select **Letters - Award**.
4	Click **Multiple.**
5	Select **Screen** as the Report File Destination.
6	Select your printing options. In this case, select: **Permanent** for Address and **Last Name** for Sort Order. Enter **09/20/2001** as the Acceptance Date and mark **Exclude Records with Award Letter Received?** Leave all the other fields with their default values.



Options

Address: Permanent

Sort Order: Last Name

Acceptance Date: 09/20/2001

Exclude Heading From Letter? ☐

Exclude Records with Award Letter Received? ☑

Exclude Needs Analysis? ☐

Print User Defined Text? ☐

Print Missing Documents? ☐

Exclude Signature? ☐

Print School Name/Address? ☑

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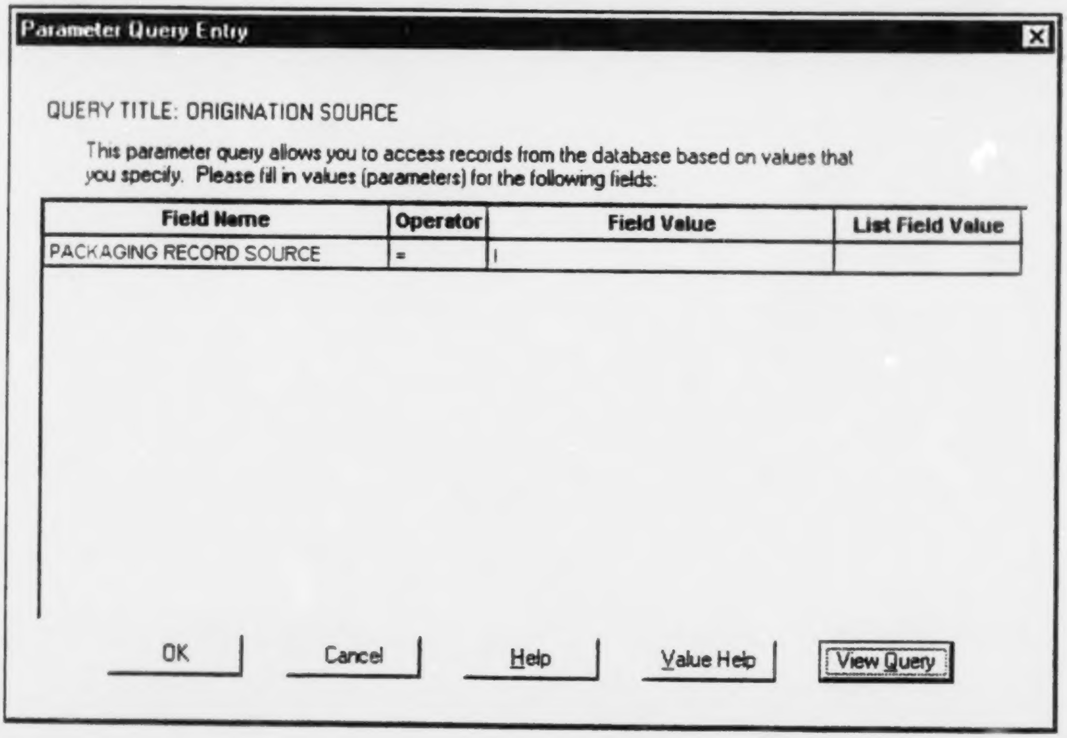
Generating Multiple Award Letters:

Instructor Demonstration (continued)

Step	Action
7	Click **Selection Criteria.**
8	Click the **ellipsis** button next to Query Title.
9	Select a query. In this case, select **Origination Source.**
10	Click **OK** to return to the Selection Criteria dialog box.
11	Click **OK**.
12	The Parameter Query Entry Box displays. Click **Value Help** to display the valid values for the Origination Source. The parameter query that we have chosen selects students according to how their records were created. In this case we want to select students whose record source is an ISIR. Click **OK.**
13	Click in the **Field Value** field and type **I**. Click **OK.**



Parameter Query Entry

QUERY TITLE: ORIGINATION SOURCE

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
PACKAGING RECORD SOURCE	=	I	

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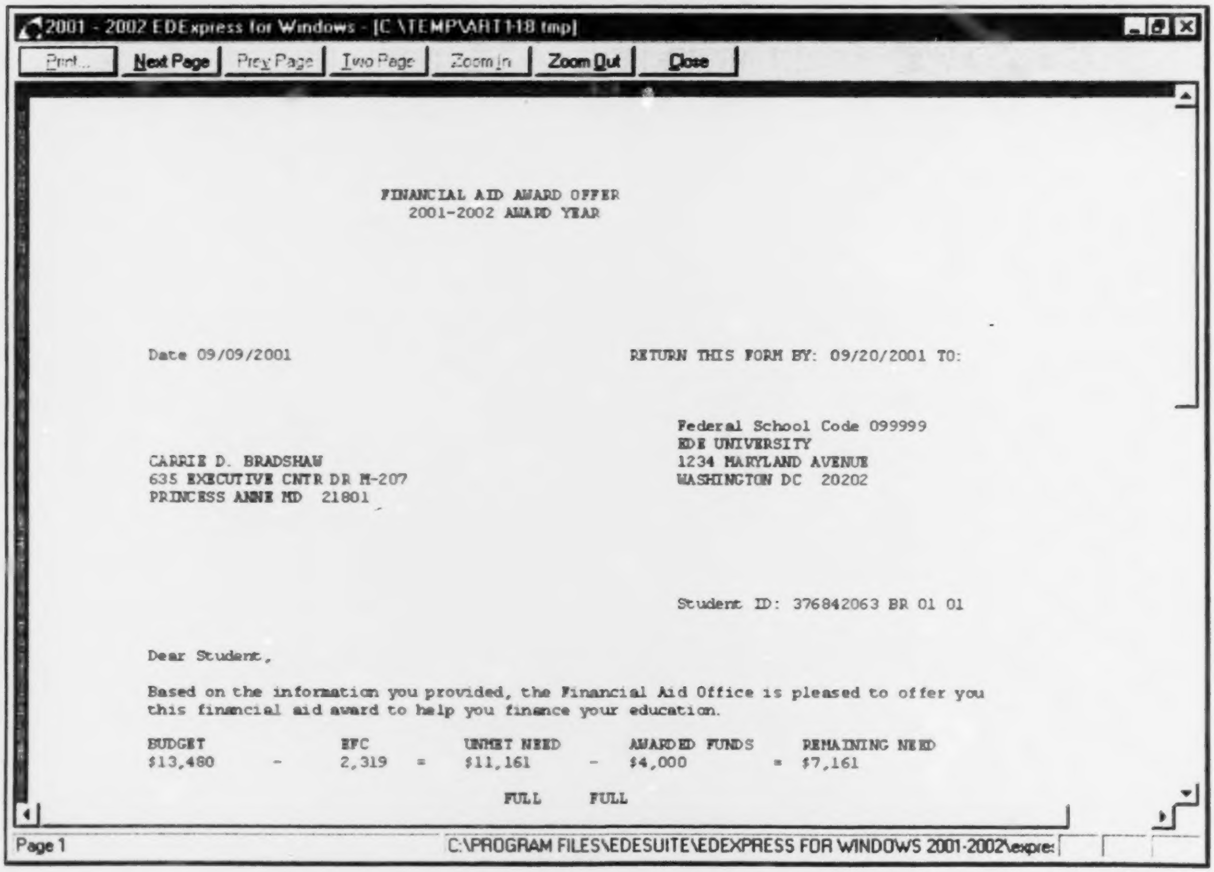
Generating Multiple Award Letters:

Instructor Demonstration (continued)

Step	Action
14	The View Query dialog box displays. Click **Close.**
15	The Print dialog box displays again. Click **OK** to generate the letters.
16	Click **Close** when you have completed reviewing the letters on screen. Note: You cannot print the award letter from the screen print. You must repeat the process and select Printer or File.


2001 - 2002 EDExpress for Windows - [C:\TEMP\ART118.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

FINANCIAL AID AWARD OFFER
2001-2002 AWARD YEAR

Date 09/09/2001

RETURN THIS FORM BY: 09/20/2001 TO:

Federal School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON DC 20202

CARRIE D. BRADSHAW
635 EXECUTIVE CNTR DR M-207
PRINCESS ANNE MD 21801

Student ID: 376842063 BR 01 01

Dear Student,

Based on the information you provided, the Financial Aid Office is pleased to offer you this financial aid award to help you finance your education.

```
BUDGET          EFC        UNMET NEED       AWARDED FUNDS      REMAINING NEED
$13,480    -    2,319  =   $11,161     -    $4,000         =   $7,161
                                  FULL     FULL
```

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Generating a Single Award Letter:

Instructor Demonstration

In addition to generating and printing batches of award letters, EDExpress also allows you to print a single letter from an open student record.

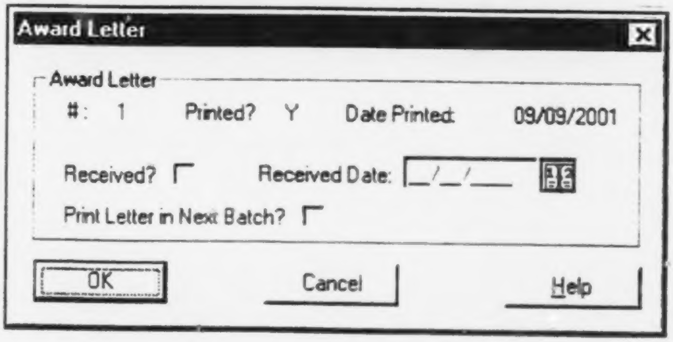
The Print dialog box that displays is very similar to the one that displays when you generate and print multiple award letters. The only differences are those EDExpress defaults to print a single letter, the sort order option is excluded, and your only print option is printing the award letter directly to the printer.

Step	Action
1	Select **File/Open** from the menu bar.
2	Enter **989-89-8989,** the SSN for **Maxwell Smart.** Click **OK.**
3	The demographic record displays. Click the **Awards** tab.
4	Click the **Printer** icon on the tool bar.
5	Click the down arrow in the Report section. Select **Award Letter**.
6	Select **Permanent** as the Address.
7	Enter **09/20/2001** as the Acceptance Date.
8	Click **OK** to generate the award letter.
9	A Print dialog box displays. Click **Cancel** since the computer used for this training is not connected to a printer.

Reviewing the Awards Tab: Instructor Demonstration

Next, we will open a student's record to see how generating and printing the award letter updates the packaging record. Note that printing an award letter to the screen will not update the student's record; you must print the letter to a printer or file.

Step	Action
1	With the Maxwell Smart's record open to the Awards tab, click the **Award Letter** button.
2	The Award Letter dialog box displays options available to help you track the status of the award letter. • **Award Letter #**—Number of award letters that have been generated. Remember that once the maximum number of award letters (set in Packaging System setup) has generated for a student record, you won't be able to include this record in a batch print. However, you can override the default by printing a single award letter from the open student record. • **Printed?**—Default N updates to Y once award letter prints. • **Date Printed**—Date award letter last printed. • **Received?**—A check in this box indicates you received a response to the award letter offer. • **Date Received**—Date you received the response. • **Print Letter in Next Batch?**—A check in this box allows you to include the record in the next batch of award letters you generate (if the student record meets the selection criteria).
3	Click **OK**. Click the **Close** icon.



Award Letter

Award Letter

#: 1 Printed? Y Date Printed: 09/09/2001

Received? ☐ Received Date: __/__/____

Print Letter in Next Batch? ☐

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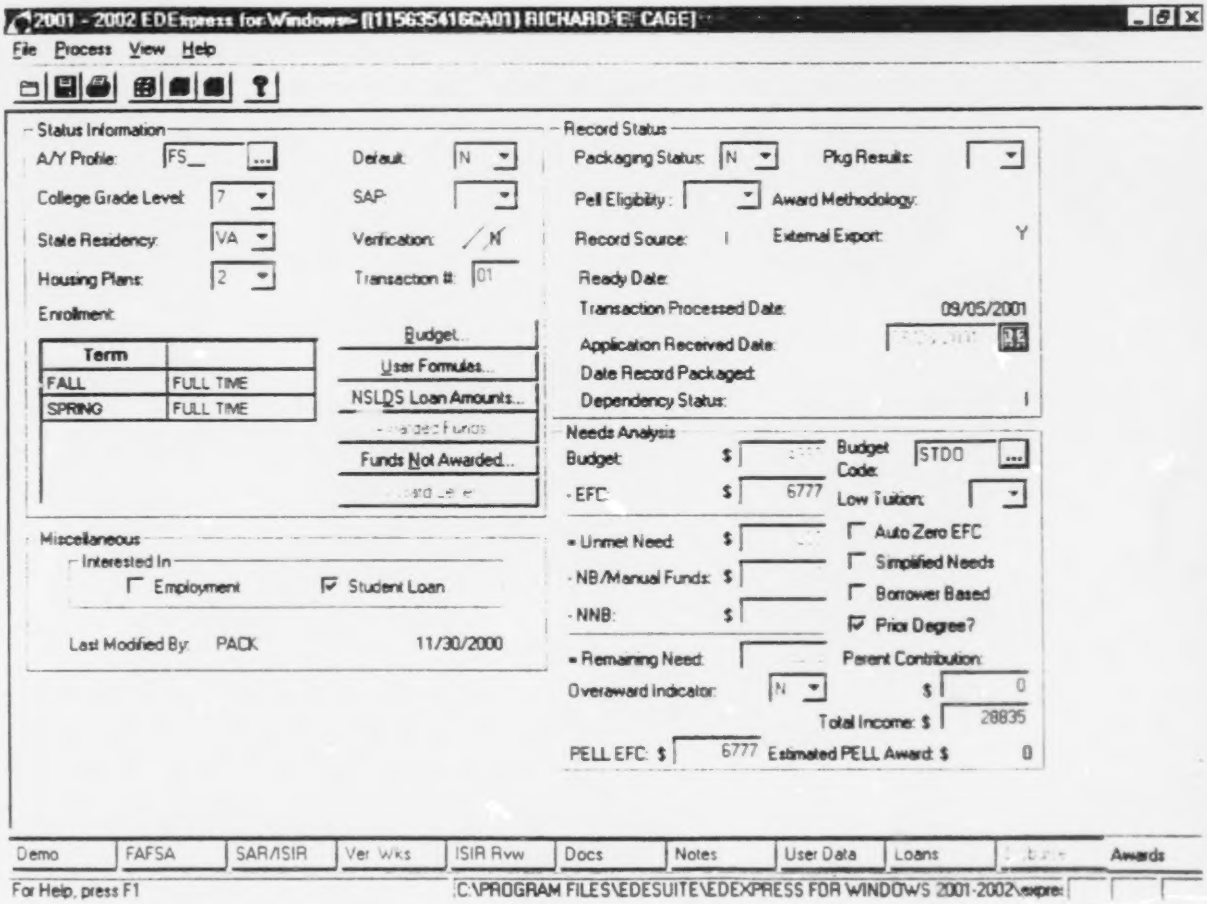
Session 5 Exercise

Instructions

Review each of the next three printed packaging record screens in your Participant's Workbook and answer the questions that follow for each.

#1 Richard Cage


File
Process
View
Help
Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds
Funds Not Awarded...
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
[illegible]
Awards

2001 - 2002 EDExpress for Windows - [[115635416CA01] RICHARD E CAGE]

Status Information
A/Y Profile: FS_
College Grade Level: 7
State Residency: VA
Housing Plans: 2
Default: N
SAP:
Verification: / N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment ☑ Student Loan
Last Modified By: PACK 11/30/2000

Record Status
Packaging Status: N
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date:
Transaction Processed Date: 09/05/2001
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $ [illegible]
- EFC: $ 6777
= Unmet Need: $ [illegible]
- NB/Manual Funds: $
- NNB: $
= Remaining Need:
Overaward Indicator: N
Budget Code: STD0
Low Tuition:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☑ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 28835
PELL EFC: $ 6777
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre

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Session 5 Exercise (cont.)

Questions about #1 Richard Cage

1. How was the packaging record created? ______________________________

   How can you tell? ______________________________

2. Has the record been packaged? ______________________________

   How can you tell? ______________________________

3. If the record has not been packaged, is it ready to be packaged?______________________________

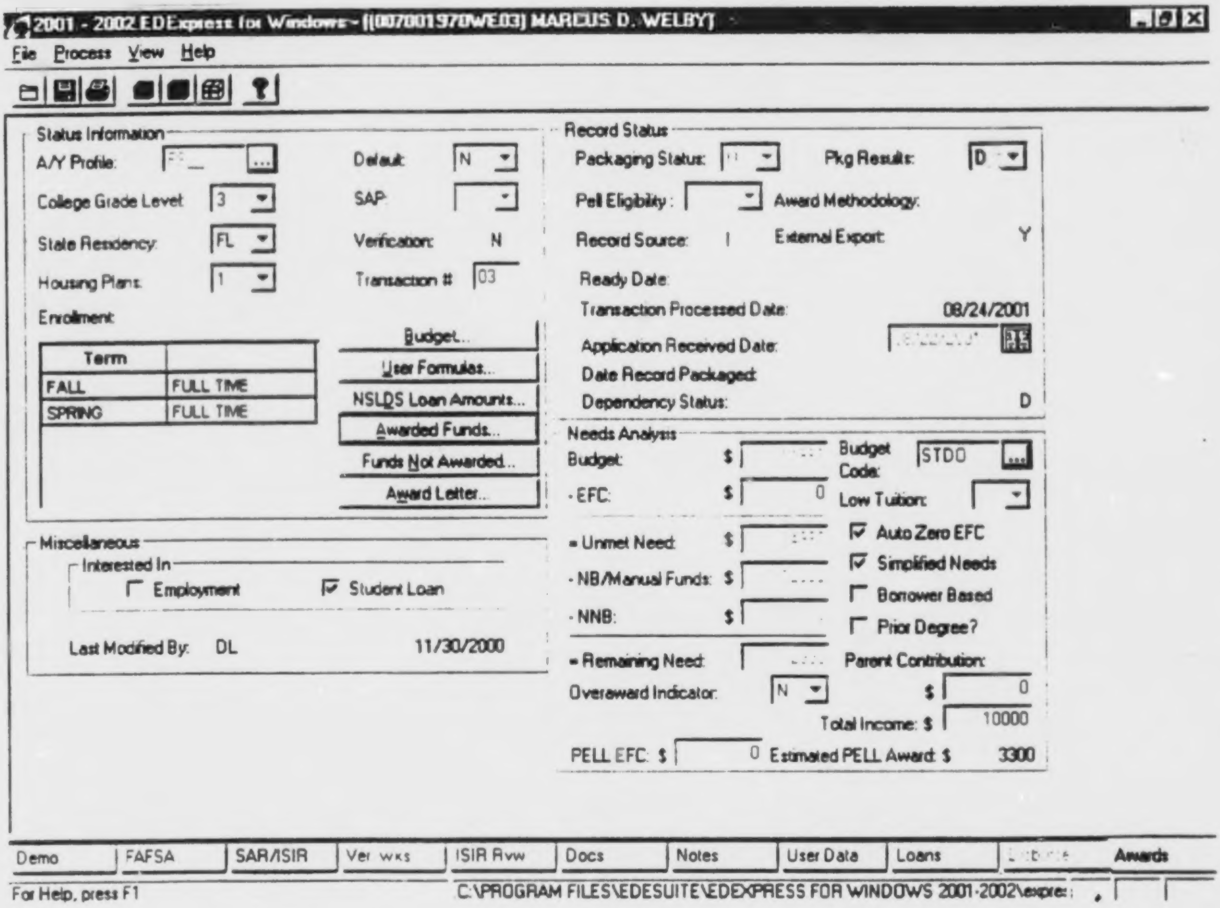
   How can you tell? ______________________________

4. If the record is not ready to be packaged, what are the possible reason(s) it is not ready?

   ____

Session 5 Exercise (cont.)

#2 Marcus Welby


2001 - 2002 EDExpress for Windows - [(007001970WE03) MARCUS D. WELBY]
File
Process
View
Help
Budget...
User Formulas...
NSLDS Loan Amounts...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expre:

Status Information

A/Y Profile:

College Grade Level: 3

State Residency: FL

Housing Plans: 1

Default: N

SAP:

Verification: N

Transaction #: 03

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☐ Employment ☑ Student Loan

Last Modified By: DL 11/30/2000

Record Status

Packaging Status:

Pkg Results: D

Pell Eligibility:

Award Methodology:

Record Source: I

External Export: Y

Ready Date:

Transaction Processed Date: 08/24/2001

Application Received Date:

Date Record Packaged:

Dependency Status: D

Needs Analysis

Budget: $

Budget Code: STDO

- EFC: $ 0

Low Tuition:

= Unmet Need: $

☑ Auto Zero EFC

- NB/Manual Funds: $

☑ Simplified Needs

- NNB: $

☐ Borrower Based

☐ Prior Degree?

= Remaining Need:

Parent Contribution: $ 0

Overaward Indicator: N

Total Income: $ 10000

PELL EFC: $ 0

Estimated PELL Award: $ 3300

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Session 5 Exercise (cont.)

Questions about #2 Marcus Welby

1. How was the packaging record created? ______________________________

How can you tell? ______________________________

2. Has the record been packaged? ______________________________

How can you tell? ______________________________

3. If the record has been packaged, did the student accept the award? ______________________________

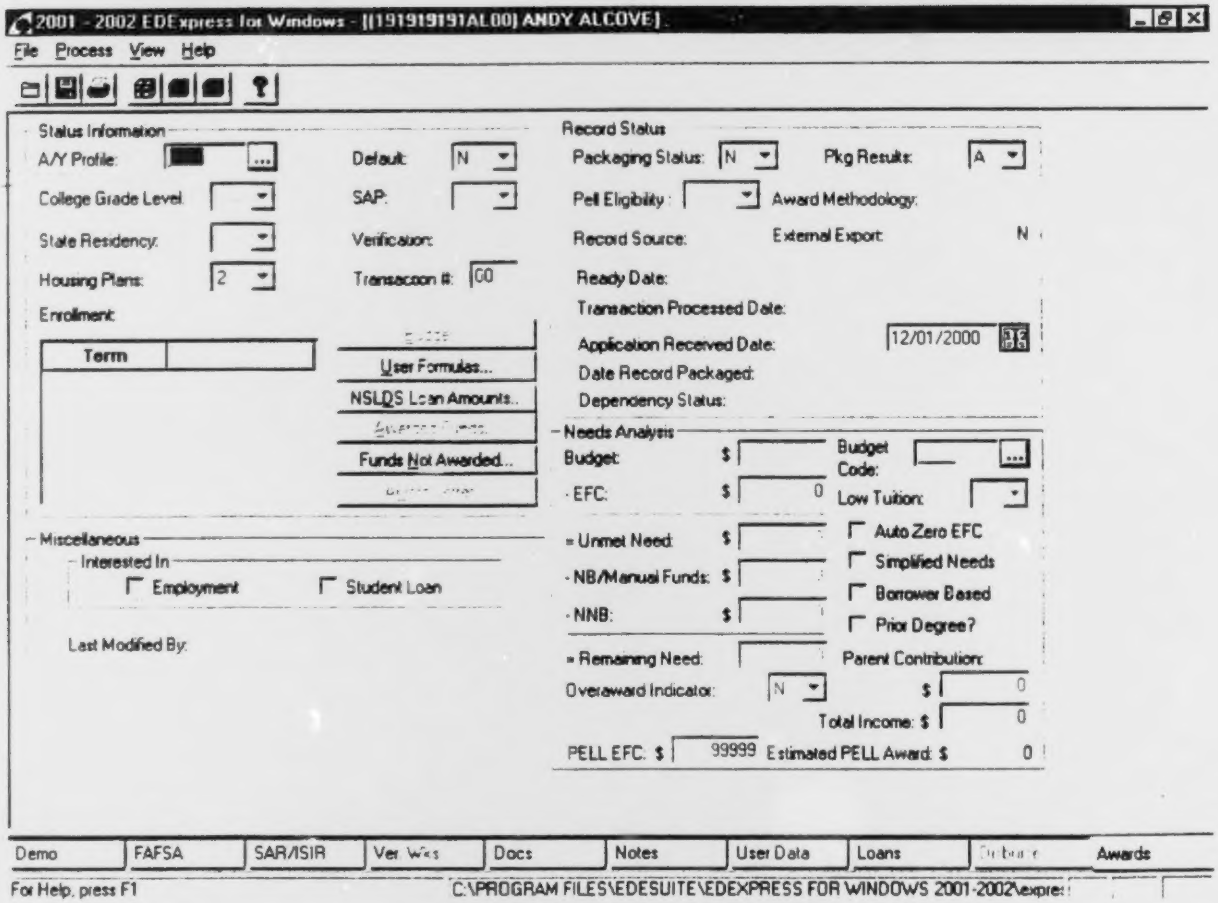
How can you tell? ______________________________

4. If the record has been packaged, how can you find out how much was awarded from each source of aid?

____

Session 5 Exercise (cont.)

#3 Andy Alcove


2001 - 2002 EDExpress for Windows - [(191919191AL00) ANDY ALCOVE]

Default: N

Housing Plans: 2

Transaction #: 00

Packaging Status: N

Pkg Results: A

External Export: N

Application Received Date: 12/01/2000

EFC: $ 0

Overaward Indicator: N

Parent Contribution: $ 0

Total Income: $ 0

PELL EFC: $ 99999

Estimated PELL Award: $ 0

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS 2001-2002\expres

File
Process
View
Help
Status Information
A/Y Profile:
College Grade Level:
State Residency:
Enrollment
Term
SAP:
Verification:
User Formulas...
NSLDS Loan Amounts...
Funds Not Awarded...
Miscellaneous
Interested In
☐ Employment
☐ Student Loan
Last Modified By:
Record Status
Pell Eligibility:
Award Methodology:
Record Source:
Ready Date:
Transaction Processed Date:
Date Record Packaged:
Dependency Status:
Needs Analysis
Budget: $
Budget Code:
Low Tuition:
= Unmet Need: $
- NB/Manual Funds: $
- NNB: $
= Remaining Need:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards

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Session 5 Exercise (cont.)

Questions about #3 Andy Alcove

1. How was the packaging record created? ____________________

2. Has the record been packaged? ____________________

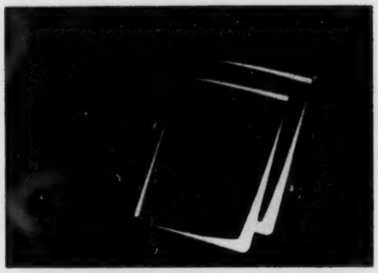
How can you tell? ____________________

3. If the record has not been packaged, is the record ready to be packaged?____________________

How can you tell? ____________________

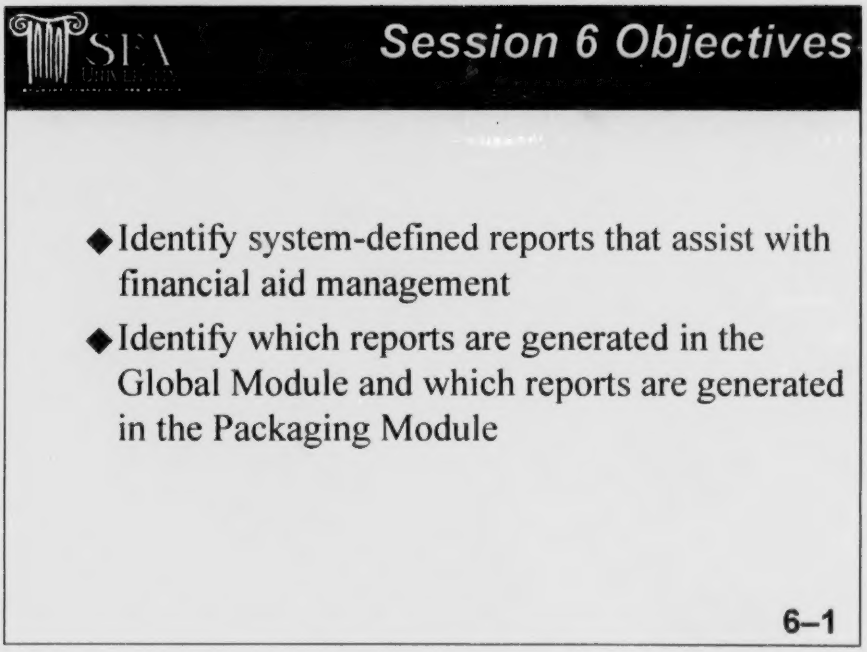
4. If the record is not ready to be packaged, what needs to be done to make it ready?

____



Session 6: Reports

Session 6—Reports



Session 6 Objectives

- ◆ Identify system-defined reports that assist with financial aid management
- ◆ Identify which reports are generated in the Global Module and which reports are generated in the Packaging Module

6–1

Key Terms

Record Layouts

Record layouts list the field definitions for data records that are transmitted to and received from the CPS, the LOC and RFMS. They include field numbers, field lengths, field descriptions, valid values, start positions, and end positions. These record layouts can also be found in the EDE Technical Reference, Direct Loan Technical Reference, and RFMS (Pell) Technical Reference.

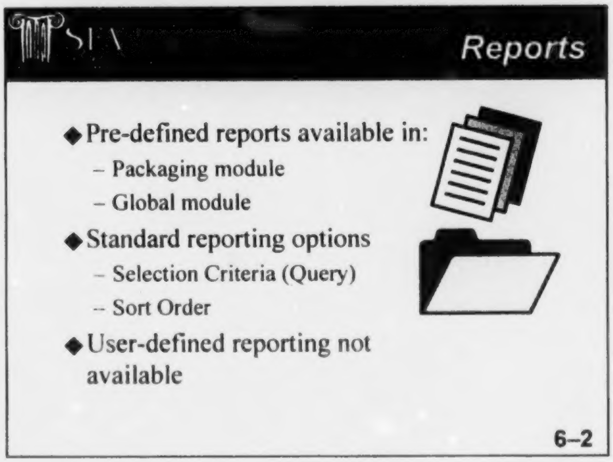
The record layouts used to transmit data to and from mainframe systems, Import External Add and Import External Change, are also available in the Packaging Technical Reference.

Fund Maintenance

Before you make your first financial aid award, determine what funds you will be using and how much money you have available to award. Define your sources of funding within Packaging Setup using the Fund Maintenance function. This function allows you to add and maintain as many aid sources as you need for Packaging students. Fund Maintenance also gives you the total amounts awarded. Aid Type codes D, E, F, K, P, S, U, and W can only be used once.

Measurement Tools

You have the ability to print the Measurement Tools - Funds report. This report assists you in determining the number of students who receive specific funds and the percentage of aid applicants who receive each available fund. You determine the number of aid applicants by using the number of packaging records on the Packaging Student table.



Reports

- Pre-defined reports available in:
  - Packaging module
  - Global module
- Standard reporting options
  - Selection Criteria (Query)
  - Sort Order
- User-defined reporting not available

6–2

Reports in EDExpress

EDExpress features a number of different reports within each module. These reports are accessed via the Print function. The reports associated with packaging functions are printed via the Packaging module, while those associated with document tracking are printed via the Global module.

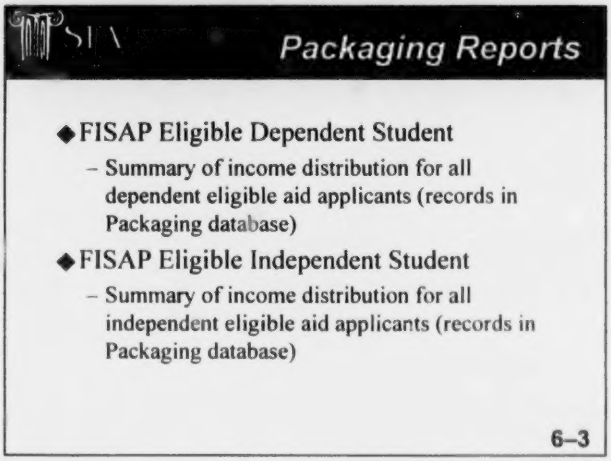
Most reports include a Selection Criteria option to allow you to select specific records. Most give you the option to sort the data alphabetically or by SSN. The pre-defined reports available within the Packaging module include:

FISAP Eligible Dependent Students
FISAP Eligible Independent Students
Letters Award
List-Entered Packaging Records
List-Fund Maintenance
List-Packaged Students by Fund Code
List-Packaged Students
List-Unpackaged Students
Measurement Tools - Funds
Packaging Record
Packaging Setup
Record Layout – Import External Add
Record Layout – Import External Change
Record Layout – User Defined Formats
Record Layout – Change Field Numbers
Record Layout – Import Add Fund Amounts

Examples of these reports are provided in Appendix D.

Although the EDExpress reporting function doesn't include user-defined reports, expert Microsoft Access users should have no problem creating and generating custom reports using Access.

Note: Make a copy of your production database before using it to generate reports.



Packaging Reports

- FISAP Eligible Dependent Student
  - Summary of income distribution for all dependent eligible aid applicants (records in Packaging database)
- FISAP Eligible Independent Student
  - Summary of income distribution for all independent eligible aid applicants (records in Packaging database)

6–3

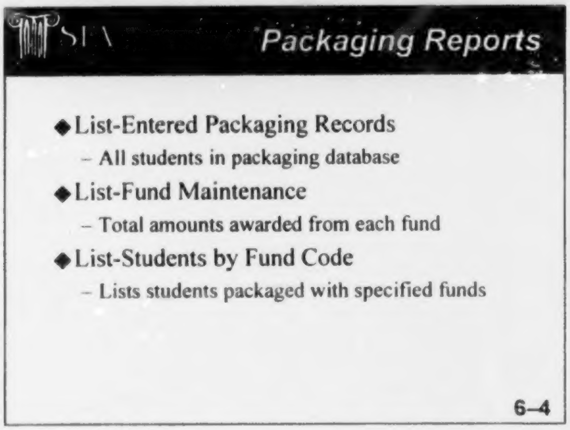
FISAP-Eligible Dependent Students

This report provides a summary of the distribution by income of all dependent eligible aid applicants in the Packaging database. This report is useful when preparing Section E of the FISAP.

Note: The Less than column from the income grid was removed to match the FISAP.

FISAP-Eligible Independent Students

This report provides a summary of the distribution by income of all independent eligible aid applicants in the Packaging database. This report is useful when preparing Section E of the FISAP.



Packaging Reports

- List-Entered Packaging Records
  - All students in packaging database
- List-Fund Maintenance
  - Total amounts awarded from each fund
- List-Students by Fund Code
  - Lists students packaged with specified funds

6–4

List-Entered Packaging Records

This report provides a listing of all students in the Packaging database without regard to their packaging status.

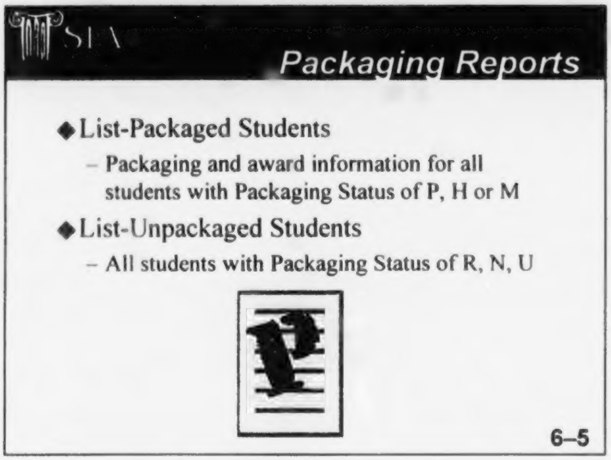
List-Fund Maintenance

The Fund Maintenance List provides real time information about total amounts awarded from each fund.

List-Students by Fund Code

This report includes a list of students packaged from one or more funds you designate. The report lists SSNs, names, award amounts, and a summary total of the amount awarded from each fund. The information is first sorted according to Fund Code, then according to SSNs within each fund code.

New! New for 2001-2002: You can print the list by SSN or last name. Also, new for this year is the ability to print lists of package or not packaged records.



Packaging Reports

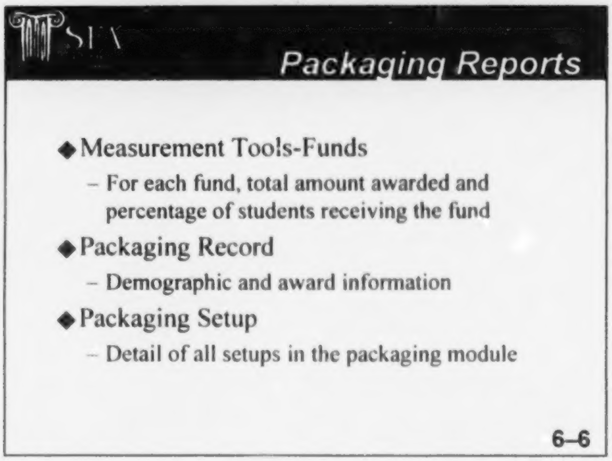
- List-Packaged Students
  - Packaging and award information for all students with Packaging Status of P, H or M
- List-Unpackaged Students
  - All students with Packaging Status of R, N, U

List-Packaged Students

This report includes all students with a packaging status of P (Packaged), H (Hand Packaged), or M (Manually Packaged) and provides detailed packaging and award information. You have the option to sort the list by last name, SSN, EFC, or priority deadline date, as well as the option to include students packaged with no funds.

List-Unpackaged Students

This listing includes any student whose packaging status is not equal to P (Packaged), H (Hand Packaged), or M (Manually Packaged) to help you determine those students who still need to be packaged.



Packaging Reports

- ◆ Measurement Tools-Funds
  - For each fund, total amount awarded and percentage of students receiving the fund
- ◆ Packaging Record
  - Demographic and award information
- ◆ Packaging Setup
  - Detail of all setups in the packaging module

6–6

Measurement Tools—Funds

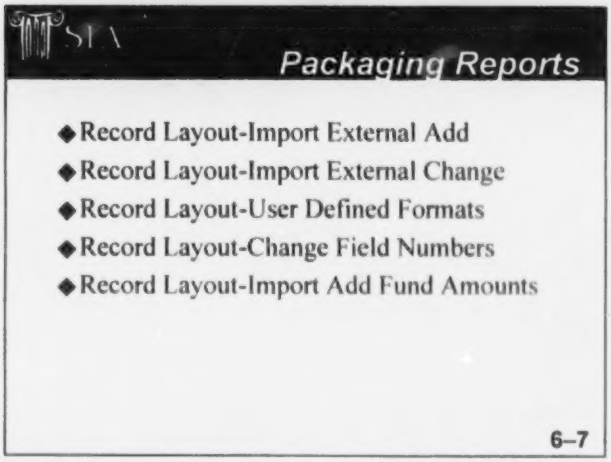
This report lists the totals awarded by aid type along with the number and percentage of students who receive funds from each aid type. The number of aid applicants reported is actually the same number of student records in the Packaging database.

Packaging Record

The Packaging Record report provides a one-page summary of the student's demographic information as well as most of the information listed on the student's Award screen. You can use this option to print either a multiple Packaging Record Report or a packaging report by entering an individual SSN. You also can print a single Packaging Record Report from an open student record.

Packaging Setup

This report provides the details of all setups you entered in the Packaging module.



Packaging Reports

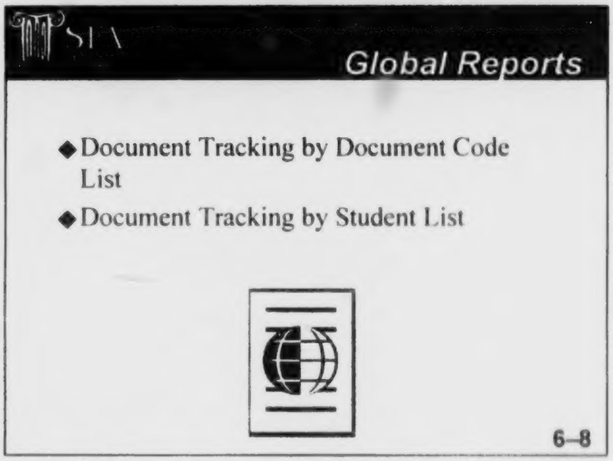
- ◆Record Layout-Import External Add
- ◆Record Layout-Import External Change
- ◆Record Layout-User Defined Formats
- ◆Record Layout-Change Field Numbers
- ◆Record Layout-Import Add Fund Amounts

6–7

Packaging Record Layouts

The record layout option allows you to print the most current version of individual record layouts used in the EDExpress Packaging system for various import/export files. The report includes the field name, field length, field type, as well as start and end positions for each field. The following individual record layouts are available in the Packaging module:

- Record Layout - Import External Add
- Record Layout - Import External Change
- Record Layout – User Defined Formats
- Record Layout – Change Field Numbers
- Record Layout – Import Add Fund Amounts



Global Reports

- Document Tracking by Document Code List
- Document Tracking by Student List

6–8

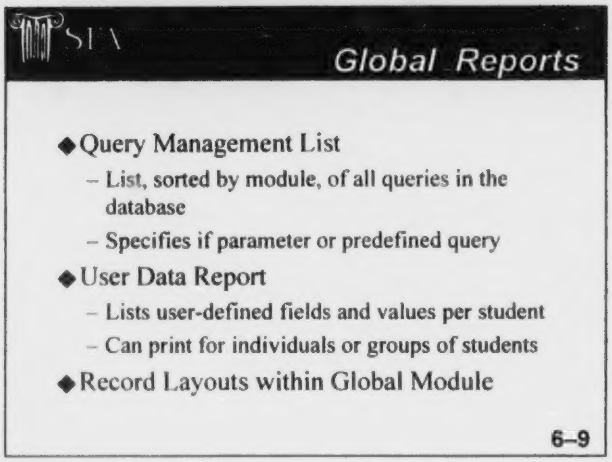
Several reports in the Global module are helpful to schools who use the Packaging module.

Document Tracking by Document Code List

Sorted by Document Code, this report provides a listing, as well as the total number, of students assigned individual documents. For each student record, the report also lists the document received date.

Document Tracking by Student List

This report provides a listing of all documents assigned to each student, document received dates, and the subtotals of the number of documents assigned to each student record. The report also includes a total of all student records in the Document Tracking database as well as a total of all documents assigned.



SFA

Global Reports

- Query Management List
  - List, sorted by module, of all queries in the database
  - Specifies if parameter or predefined query
- User Data Report
  - Lists user-defined fields and values per student
  - Can print for individuals or groups of students
- Record Layouts within Global Module

6–9

List - Query Management

This option generates a list of the queries in the database by EDExpress module. The report also indicates which queries are parameter queries as well as which are predefined by EDExpress.

User Data

The User Data Report shows the user-defined fields that you create in Global System Setup and the values entered in the database for each student, listed by SSN. You can generate this report for individual students, groups of students, or all students, depending on the selection criteria you use. You can also select specific user-defined fields to include.

Record Layouts within Global Module

The record layout option allows you to print the most current version of record layouts used in the Global module to import User Data and Demographic Data files. The report includes the field name, field length, field type, as well as start and end positions for each field.

Session 6 Exercise #1

Instructions

In the blank before each system-defined report, write the letter of the corresponding EDExpress database in which the report would be generated/printed. G = Global, P = Packaging.

_____1. Packaged Students by Fund Code

_____2. Record Layout-Import External Add

_____3. Document Tracking by Students

_____4. User-Defined Queries

_____5. User Data

_____6. Document Tracking by Document Code

_____7. User Letters

_____8. Entered Packaging Records

_____9. FISAP-Eligible Dependent Students

_____10. Award Letters

Session 6 Exercise #2

Instructions

On the line below each report description, identify the name of the report.

1. This report provides a listing of all students in the Packaging database without regard to their packaging status

2. This listing includes any student whose packaging status is not equal to P (Packaged), H (Hand Packaged), or M (Manually Packaged) to help you determine those students who still need to be packaged.

3. This report provides real-time information about total amounts awarded from each fund.

4. This report lists the totals awarded by aid type along with the number and percentage of students who receive funds from each aid type.

5. This report includes a detailed listing, as well as the total number, of students assigned individual documents. For each student record, the report also lists the document received date.

Appendices

Appendix A: Worksheets
Appendix B: Letters
Appendix C: Glossary
Appendix D: Reports
Appendix E: Query Fields

Appendix A—Worksheets

Academic Year Profile
Award Methodology
Award Methodology Remaining Need
Cost of Attendance Budget
Document Tracking
Fund Maintenance
Global System Setup
Packaging Record Review
Packaging System Setup
Query

Academic Year Profile Worksheet

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	__ __ __ __	
Is this Academic Year Profile the default Academic Year?	Yes ☐	No ☐

Enter the Academic Year Profile Title (can be alphanumeric).

Enter Pell Grant Formula

1. ☐	Standard Term 30 weeks. (Formula 1)
2. ☐	Standard Term less than 30 weeks. (Formula 2)
3. ☐	Any Term-based credit hour program. (Formula 3)
4. ☐	Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐	Correspondence Study, non term-based program. (Formula 5)
6. ☐	Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________% (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Percentage across terms cannot exceed 100%

Enter Pell percent for Pell Formulas 3, 4, 5, 6

Term Name (Free Form)	Default Enrollment Status (F,¾,½,< ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology		_ _ _ _
2. Enter up to 50 characters to create a free-form description of the award methodology.		
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.		_ _ _
4. For Aid Maximums use:	☐ Percentages	☐ Dollar Amounts
5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans.		
6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid.		
7. Select a Query that is used to select the group of students for this funding package (optional).		

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**

Award Methodology Remaining Need Worksheet

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	_ _ _ _
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	_ _ _
3. Enter up to fifty (50) characters to create a free-form title.	
4. Select a Query that is used to select the group of students who should receive this budget (optional).	

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code:

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year:

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description:

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**. _ _ _ _ _ _ _ _

2. Enter up to 25 characters to create a free-form **Fund Description**. _

3. Select an **Aid Type** from below.

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
W = Federal Work-Study

L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
Y = Other Work-Study

S = Subsidized Stafford
U = Unsubsidized Stafford - Non Need based
D = Unsubsidized Stafford - Need based
V = VA Benefits Americorp

4. Enter the **Beginning Fund Balance**. $

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Global System Setup Worksheet

Allow notepad entries to be edited?	☐ Yes ☐ No
Default System to display?	☐ Global ☐ App Express ☐ Packaging ☐ ____________________
Number of Days to reprint Document Tracking Letters?	
Number of Times to reprint Document Tracking Letters?	
Number of Copies of Document Tracking Letters to Print?	
Return to Dialog?	☐ Yes ☐ No
Print Default?	☐ Multiple Records ☐ Single Record
TG ID #	

Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

Packaging System Setup Worksheet

Enter total number of award letters to be printed per student.	
Enter maximum number of award letters to be sent per student.	
Enter Award Letter Type	☐ O (Offer) ☐ N (Notification)
Allow Pell EFC to be modified?	☐ Yes ☐ No
Enter Packaging Results Default Status	☐ O (Offered) ☐ A (Accepted)
Enter Priority Date Deadline Type	☐ A (Received Date) ☐ P (Processed Date) ☐ R (Ready Date) ☐ U (User Defined Date)
User Defined Date Name (required for Priority Date Deadline Type U)	
Use Low Tuition?	☐ Yes ☐ No
Enter Default Housing Status	☐ 1 (On campus) ☐ 2 (Off campus) ☐ 3 (With parent)

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Appendix B—Letters

Additional Award Letter Text B-1
Award Missing Information Letter B-2
Document Tracking Letter B-3
Document Tracking Letter with User Text B-4
Notification Award Letter B-5
Offer Award Letter B-6
User Letter B-7

Date 03/15/2001

Federal School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON DC 20090

Student ID: 105716346 WO 01 04

Dear Student,

Please read the following directions carefully. If you do not follow the directions precisely, you will not receive any financial aid.

Date 03/15/2001

Federal School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON DC 20090

Student ID: 105716346 WO 01 04

Dear Student,

Please read the following directions carefully. If you do not follow the directions precisely, you will not receive any financial aid.

Please note, this offer is an estimate until we have received the following documents from you to complete your financial aid file. The following documents are missing and/or incomplete:

Missing	2001-2002 Institutional Application
Missing	2001-2002 PARENTS TAX FORM

BEST COPY AVAILABLE

DOCUMENT TRACKING LETTER
2001-2002 AWARD YEAR

Date 02/03/2001

School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON, DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON, DC 20090

Student ID 105716346 WO 01

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing	2001-2002 Institutional Application
Missing	2001-2002 PARENTS TAX FORM

BEST COPY AVAILABLE

DOCUMENT TRACKING LETTER
2001-2002 AWARD YEAR

Date 02/19/2001

School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON, DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON, DC 20090

Student ID 105716346 WO 01

Dear Student,

We have received your 2001-2002 Student Aid Report. Currently, one of your professional financial aid administrators is working with your file to package your financial aid.

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing	2001-2002 Institutional Application
Missing	2001-2002 PARENTS TAX FORM

FINANCIAL AID AWARD NOTIFICATION
2001-2002 AWARD YEAR

Date 02/03/2001

Federal School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON DC 20090

Student ID: 105716346 WO 01 02

Dear Student,

Based on the information you provided, the Financial Aid Office is pleased to notify you of the following financial aid award(s) to help you finance your education.

BUDGET		EFC		UNMET NEED		AWARDED FUNDS		REMAINING NEED
$15,080	-	749	=	$14,331	-	$11,550	=	$2,781

TYPE OF AID	Decline?	FULL TIME FALL	FULL TIME SPRING	TOTALS
************************	********	********	********	******
FEDERAL PELL GRANT	[]	$ 1275	$ 1275	$ 2550
FEDERAL SEOG	[]	$ 1000	$ 1000	$ 2000
FEDERAL WORK STUDY	[]	$ 1250	$ 1250	$ 2500
FEDERAL PERKINS	[]	$ 1000	$ 1000	$ 2000
SCHOOL GRANT	[]	$ 750	$ 750	$ 1500
STATE GRANT	[]	$ 500	$ 500	$ 1000

TOTAL AWARDED FUNDS $11550

BEST COPY AVAILABLE

FINANCIAL AID AWARD OFFER
2001-2002 AWARD YEAR

Date 02/03/2001

RETURN THIS FORM BY: 04/03/2001 TO:

Federal School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON DC 20090

Student ID: 105716346 WO 01 01

Dear Student,

Based on the information you provided, the Financial Aid Office is pleased to offer you this financial aid award to help you finance your education.

BUDGET		EFC		UNMET NEED		AWARDED FUNDS		REMAINING NEED
$15,080	-	749	=	$14,331	-	$14,331	=	$0

		FULL TIME	FULL TIME	
TYPE OF AID	Decline?	FALL	SPRING	TOTALS
FEDERAL PELL GRANT	☐	$ 1275	$ 1275	$ 2550
FEDERAL SEOG	☐	$ 1000	$ 1000	$ 2000
FEDERAL WORK STUDY	☐	$ 1250	$ 1250	$ 2500
FEDERAL PERKINS	☐	$ 1000	$ 1000	$ 2000
SCHOOL GRANT	☐	$ 750	$ 750	$ 1500
STATE GRANT	☐	$ 500	$ 500	$ 1000
SUBSIDIZED STAFF LOAN	☐	$ 1391	$ 1390	$ 2781
TOTAL AWARDED FUNDS				$14331

2001-2002 SAR Received for New Student

Date 03/15/2001

School Code 099999
EDE UNIVERSITY
1234 MARYLAND AVENUE
WASHINGTON, DC 20202

LING L. WOO
1701 NORTH FLAGLER APT 111
WASHINGTON, DC 20090

Student ID 105716346 WO 01

Welcome!

Our Financial Aid Office has received your 2001-2002 Student Aid Report. As soon as we have confirmed your admission to our school for the 2001-2002 academic year, we will begin processing your financial aid.

If everything in your file is in order, you may expect to receive your financial aid award within two weeks. Should we require additional documentation, we'll contact you by telephone. In the meantime, please do not hesitate to contact us if you have questions.

We sincerely appreciate your interest in our school and look forward to serving you.

Sincerely,

Financial Aid Office

Appendix C— Glossary

Academic Year Profile

This is a profile you establish or create that defines your school's academic year. For each Academic Year Profile your school establishes, you may specify up to five terms for use in the Packaging process. One Pell Grant formula must be defined for the Academic Year Profile. For each of the terms within the profile, you may indicate enrollment status and aid source percentages. You are also required to define a code and title for each Academic Year Profile. The code is the key to the profile and appears on the Packaging record.

Academic year

(1) A period that begins on the first day of classes and ends on the last day of classes or examinations and that is a minimum of 30 weeks (except as provided in Sec. 668.3) of instructional time during which, for an undergraduate educational program, a full-time student is expected to complete at least--(i) Twenty-four semester or trimester hours or 36 quarter hours in an educational program whose length is measured in credit hours; or (ii) Nine hundred clock hours in an educational program whose length is measured in clock hours.

Award Methodology

In the award methodology profile, you can establish methodologies for determining the manner in which various funds are awarded to students. A methodology dictates which funds and what amounts are allocated to a student. Each methodology has a unique code and priority

You can create up to 999 methodologies to package selected groups of students.

The Packaging process reads the award methodology database to determine which methodology to use for Packaging a given student. If the student meets the criteria of a given methodology, that methodology is used to package the student. This changes the Packaging Status code to a P. If a student meets the criteria for a methodology but is not awarded funds by that methodology in addition to Pell, the reasons are noted in the Funds Not Awarded table on the student record and the system searches for the next methodology for which the student meets the criteria.

The packaging process will use each methodology for which the student meets the qualification criteria until the student is awarded funds by a methodology in addition to their Pell eligibility. If the packaging process uses every methodology for which the student meets the criteria, yet the student still does not receive any awards, then the last methodology ran through the process is stored as the Award Methodology for the student.

Document Tracking Setup Worksheet

Document tracking allows you to manage what documents are required of your students.

Fund Maintenance

Before you make your first financial aid award, determine what funds you will be using and how much money you have available to award. Define your sources of funding within Packaging Setup using the Fund Maintenance function. This function allows you to add and maintain as many aid sources as you need for Packaging students. Fund Maintenance also gives you the total amounts awarded. Aid Type codes E, F, K, P, S, and U can only be used once.

Gift Aid

Financial aid that a student is not required to repay or earn through employment. Generally, gift aid is in the form of a grant or scholarship.

Measurement Tools

You have the ability to print the Measurement Tools - Funds report. This report assists you in determining the number of students who receive specific funds and the percentage of aid applicants who receive each available fund. You determine the number of aid applicants by using the number of packaging records on the Packaging Student table.

Packaging Philosophy

The logic and reasoning a school uses in determining how to award students financial aid.

Packaging Status

Indicates the current status of the record and displays one of the following codes:

U=Unpackage

R=Ready to package

N=Not Ready to package

P=Package

S=Suspend

H=Hand package

M= Manually adjusted package

Packaging

The process of finding the best combination of aid to meet a student's financial need, given limited resources and given institutional constraints that vary from school to school.

Record Layouts

Record layouts list the field definitions for data records that are transmitted to and received from the CPS, the LOC and RFMS. They include field numbers, field lengths, field descriptions, valid values, start positions, and end positions. These record layouts can also be found in the EDE Technical Reference, Direct Loan Technical Reference, and RFMS (Pell) Technical Reference.

The record layouts used to transmit data to and from mainframe systems, Import External Add and Import External Change, are also available in the Packaging Technical Reference.

SAP (Satisfactory Academic Progress)

Every school participating in the SFA Programs must monitor its SFA recipients to ensure that they are meeting satisfactory progress standards. Each school must develop reasonable standards for measuring academic progress, which must contain elements specified in the regulations.

A school's satisfactory progress policy for students receiving SFA funds must be at least as strict as the policy used for students who do not receive SFA funds. The policy must be applied consistently to all SFA recipients within identifiable categories of students (such as full-time or part-time, graduate, or undergraduate students). Note that the school's satisfactory progress policy must include both a qualitative measure (such as the use of cumulative grade point average) and a quantitative measure (such as a maximum time frame for completion) of the student's progress.

SAP

Satisfactory Academic Progress. (a) If a student is enrolled in an program of study and has a grade point average of at least a "C" or its equivalent, or has academic standing consistent with the institution's requirements for graduation. A student's academic progress must be reviewed at the end of each year.

Self-Help Aid

Student financial aid loan programs where funds must be repaid or employment-opportunity programs awarded to students.

Trankey

The trankey is the student's SSN followed by the first two letters of the last name and transaction number. The trankey is also called the original student ID.

Verification

The CPS selects a certain percentage of FAFSAs , some randomly and others based on certain edit criteria, for data verification. Schools must verify certain data reported on these FAFSAs, using documentation provided by the student. (Many schools also choose to verify additional applications beyond those selected during processing.) For more information, see the Verification Guide.

Appendix D—Reports

FISAP—Eligible Dependent Students D-1
FISAP—Eligible Independent Students D-2
List—Entered Packaging Records D-3
List—Fund Maintenance D-4
List—Packaged Students D-5
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Record Layout—Import External Change D-28

```
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Report Time:    15:33:37      EDEXPRESS - 2001-2002
                         ELIGIBLE DEPENDENT AID APPLICANTS - DETAIL
****************************************************************************
TAXABLE &
NONTAXABLE INCOME              STUDENT NAME                    SSN          STATUS
------------------  ---------------------------------  -----------  ------------
$      0 - $  2,999  DELUCCA FRANK J                    604-72-4836 AUTO ZERO EFC

$  3,000 - $  5,999  CARTMAN ERIC C                     167-73-6707 FT UNDRGRD

$  6,000 - $  8,999  HUGLEY DARRYL L                    280-79-0851 AUTO ZERO EFC

$  9,000 - $ 11,999  MUNROE JILL J                      649-24-0609 FT UNDRGRD
                     WYNDHAM JACQUELINE A               690-12-9048 AUTO ZERO EFC

$ 12,000 - $ 14,999  SKINNER SEYMOUR K                  194-74-0951 AUTO ZERO EFC

$ 15,000 - $ 17,999  BUNDY KELLY                        170-79-1951 FT UNDRGRD

$ 18,000 - $ 23,999  HOBBS MIRANDA D                    606-51-7684 FT UNDRGRD
                     LUNCHLADY DORIS M                  329-29-2736 FT UNDRGRD
                     GAMBLE HELEN J                     106-81-1398 FT UNDRGRD

$ 24,000 - $ 29,999  RAMANO ROBERT E                    616-26-3042 FT UNDRGRD
                     MELFI JENNIFER E                   254-87-8973 FT UNDRGRD
                     STEPHENS SAMANTHA J                126-81-5096 FT UNDRGRD
                     HATCHER LUCY L                     985-70-8731 FT UNDRGRD
                     CRANE NOEL A                       446-77-5495 FT UNDRGRD
                     LEERY DAWSON J                     432-87-7520 FT UNDRGRD
                     AUSTIN KATE R                      324-03-2483 FT UNDRGRD
                     WILLIS HELEN L                     490-24-8305 FT UNDRGRD
                     HAGSTROM JANEY                     601-76-0605 FT UNDRGRD

$ 30,000 - $ 35,999  OCONNELL MARY M                    409-99-4655 FT UNDRGRD
                     DUNCAN SABRINA H                   603-71-9006 FT UNDRGRD
                     TURNER BENJAMIN P                  199-81-5941 FT UNDRGRD
                     CLIFTON BERNICE M                  394-97-7941 FT UNDRGRD
                     NYLUND ROSE E                      605-14-4141 AUTO ZERO EFC

$ 36,000 - $ 41,999  DEWEY LARGO J                      293-78-6867 FT UNDRGRD
                     POTTER JOSEPHINE R                 156-85-4187 FT UNDRGRD
                     FRYE DEREK R                       690-65-3970 FT UNDRGRD
                     SIMPSON BART H                     359-49-1028 FT UNDRGRD

$ 42,000 - $ 47,999  MUNTZ NELSON J                     588-08-0192 FT UNDRGRD
                     HOOVER ELIZABETH C                 254-90-6137 UNKNOWN
                     O'REILLY WALTER A                  200-60-2900 FT UNDRGRD
                     LEWIS JOSHUA J                     690-13-5743 FT UNDRGRD
                     REAPER GRIM M                      690-60-9026 FT UNDRGRD

$ 54,000 - $ 59,999  JONES JIMBO L                      601-66-7674 FT UNDRGRD
                     GROUNDSKEEPER WILLY E              296-78-8980 FT UNDRGRD

$ 60,000 & OVER      RUSSELL KITTY N                    603-73-3703 UNKNOWN
                     BENJAMIN GARY L                    504-22-8334 FT UNDRGRD
                     STANKY SAMANTHA M                  690-88-4045 FT UNDRGRD
```

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                      ELIGIBLE INDEPENDENT AID APPLICANTS - DETAIL
****************************************************************************
TAXABLE &
NONTAXABLE INCOME            STUDENT NAME                    SSN         STATUS
------------------- --------------------------------- ----------- -----------
$       0 - $   999 BENTON PETER J                    664-64-6446 FT UNDRGRD

$   1,000 - $ 1,999 SUMMERS BUFFY I                   451-91-6098 FT UNDRGRD
                    MALONE SAMUEL C                   374-84-0003 FT UNDRGRD

$   2,000 - $ 2,999 WIGGUM RALPH Z                    601-86-2818 FT UNDRGRD

$   6,000 - $ 7,999 SWIFT SIDNEY M                    690-13-7320 FT UNDRGRD

$   8,000 - $ 9,999 MCCORMICK KENNY M                 492-89-2244 FT UNDRGRD
                    INFANTE GERI W                    602-69-1004 FT UNDRGRD
                    WITTER PACEY G                    374-60-4403 FT UNDRGRD
                    DUNKIN FURIOUS S                  372-03-6353 FT UNDRGRD
                    WOO LING L                        105-71-6346 FT UNDRGRD

$ 12,000 - $ 13,999 BRADSHAW CARRIE D                 376-84-2063 GRAD PROF

$ 14,000 - $ 15,999 BRISCOE LENNIE K                  199-48-9999 FT UNDRGRD

$ 16,000 - $ 17,999 BRADY MARSHA J                    363-35-8863 FT UNDRGRD
                    RICHARDS MARY                     215-59-6471 FT UNDRGRD
                    PRICE LILLIAN J                   202-59-1871 FT UNDRGRD

$ 18,000 - $ 19,999 TAYLOR KELLY A                    392-72-5062 FT UNDRGRD
                    HUXTABLE HEATHCLIFF J             372-96-3213 FT UNDRGRD

$ 20,000 & OVER     TYLER ELENA D                     372-98-4628 FT UNDRGRD
                    KRABAPPEL EDNA                    254-52-7873 FT UNDRGRD
                    BOUVIER PATTY B                   171-54-2369 FT UNDRGRD
                    HANCOCK DENNIS Y                  605-79-3403 FT UNDRGRD
                    MCBEAL ALLY G                     380-81-8844 FT UNDRGRD
                    WHITNEY ALEX A                    603-50-7033 FT UNDRGRD
                    HARVEY STEVE J                    509-05-7066 GRAD PROF
                    BRADY AMY L                       351-64-6223 GRAD PROF
                    BORTON WENDELL B                  429-76-4727 FT UNDRGRD
                    CAGE RICHARD E                    115-63-5416 GRAD PROF
                    SUMNER GREGORY K                  689-22-3274 FT UNDRGRD
                    SHAPIRO CECILE R                  690-15-0859 GRAD PROF
                    SUGARBAKER ALLISON A              378-76-7854 GRAD PROF
                    TAYLOR ALLISON T                  602-17-0586 FT UNDRGRD
                    KRONK BILLY                       378-62-3472 FT UNDRGRD
                    NYLAND DANIEL L                   377-94-0494 FT UNDRGRD
                    ROSENBERG WILLOW S                170-53-7931 FT UNDRGRD
                    MONTGOMERY EDWARD F               377-40-8583 FT UNDRGRD
                    LINDLEY JENNIFER M                066-75-6265 FT UNDRGRD
                    KRAMER COSMO A                    274-75-2248 GRAD PROF
                    VAN HOUTEN MILHOUSE C             378-00-2830 FT UNDRGRD
                    MUNROE KRIS J                     373-06-4189 FT UNDRGRD
                    SEABORN SAM E                     168-77-5556 FT UNDRGRD
```

```
Report Date: 03/29/2001     U.S. DEPARTMENT OF EDUCATION                 PAGE:  1
Report Time:    15:47:18        EDEXPRESS - 2001-2002
                          LIST - ENTERED PACKAGING RECORDS
                                    (ALL RECORDS)                         SORT: SSN
      THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************
  SOCIAL        NAME   TRANS                          FIRST        PACKAGING
SECURITY NO.    CODE     #        LAST NAME            NAME          STATUS       EFC
------------    ----   -----   ----------------   ------------    ---------   -------
007-00-1970      WE      03    WELBY              MARCUS              N            0
035-09-0081      GE      04    GELLER             MONICA              N        19835
066-75-6265      LI      01    LINDLEY            JENNIFER            M            0
105-71-6346      WO      01    WOO                LING                N          749
106-81-1398      GA      02    GAMBLE             HELEN               N          517
115-63-5416      CA      01    CAGE               RICHARD             H         6777
121-21-2122      NO      00    NORTON             ED                  P            0
126-81-5096      ST      03    STEPHENS           SAMANTHA            N          719
156-85-4187      PO      02    POTTER             JOSEPHINE           P         6011
160-85-0932      SA      01    SANTOS             ANTHONY             N         9694
163-42-4490      SI      03    SIMPSON            HOMER               N         1364
167-73-6707      CA      01    CARTMAN            ERIC                P         7454
168-77-5556      SE      13    SEABORN            SAM                 P         8437

                               Total Students:  13

# - Indicates Students Packaged Without Funds.
```

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```
Report Date: 03/29/2001   U.S. DEPARTMENT OF EDUCATION
Report Time:   15:42:05       EDEXPRESS - 2001-2002                    PAGE:  1
                             LIST - FUND MAINTENANCE
    THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************
FUND DESCRIPTION   AID    BEGINNING
                   TYPE    BALANCE       ADJ TO        FUNDS       CURRENT
-----------------  ----  -----------    BEG BAL       AWARDED      BALANCE
                                       -----------  -----------  -----------
FEDERAL PELL GRAN   F    $99,999,999   $          0 $     61,050 $99,938,949
FEDERAL PERKINS     K    $   500,000   $          0 $     33,000 $   467,000
FEDERAL PLUS LOAN   P    $99,999,999   $          0 $          0 $99,999,999
FEDERAL SEOG        E    $   275,000   $          0 $     35,000 $   240,000
FEDERAL WORK STUD   W    $   500,000   $          0 $    102,500 $   397,500
SCHOOL GRANT        G    $   200,000   $          0 $     82,714 $   117,286
STATE GRANT         G    $   200,000   $          0 $     42,835 $   157,165
SUBSIDIZED STAFF    S    $99,999,999   $          0 $    139,154 $99,860,845
UNSUBSIDIZED STAF   U    $99,999,999   $          0 $     39,048 $99,960,951

TOTAL FUNDS:                       9
TOTAL FUNDS AWARDED:     $   535,301
```

```
Report Date: 03/29/2001     U.S. DEPARTMENT OF EDUCATION                  PAGE:  1
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                               PACKAGED RECORDS LIST
                                   (ALL RECORDS)                           SORT: SSN
      THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************
  SOCIAL       NAME  TRANS                              FIRST      FUND     AMOUNT    FUND
SECURITY NO.   CODE    #       LAST NAME                 NAME      CODE     AWARDED  DECISION
-----------    ----  -----  ----------------  ------------ -------- -------  --------
066-75-6265     LI    01    LINDLEY           JENNIFER     FSEOG    $  2000      A
                                                           FWS      $  2500      A
                                                           PELL     $  3300      A
                                                           PERKINS  $  1000      A
                                                           SCHOOL   $  1500      A
                                                           STATE    $  1000      A
                                                           SUB      $  2780      A

Packaging Status: M   Award Methododology: UG   Total Funds Awarded: $14080
EFC:     0                         Subtotal Count of Funds: 7

115-63-5416     CA    01    CAGE              RICHARD      FSEOG    $  1000      O

Packaging Status: H   Award Methododology:      Total Funds Awarded: $1000
EFC:  6777                         Subtotal Count of Funds: 1

121-21-2122     NO    00    NORTON            ED           FSEOG    $  2000      A
                                                           FWS      $  2500      A
                                                           PERKINS  $  2000      A
                                                           SCHOOL   $  1500      A
                                                           STATE    $  1000      A
                                                           SUB      $  2625      A

Packaging Status: P   Award Methododology: UG   Total Funds Awarded: $11625
EFC:     0                         Subtotal Count of Funds: 6

156-85-4187     PO    02    POTTER            JOSEPHINE    FWS      $  2500      A
                                                           SCHOOL   $  1500      A
                                                           STATE    $  1000      A
                                                           SUB      $  4069      A

Packaging Status: P   Award Methododology: UG   Total Funds Awarded: $9069
EFC:  6011                         Subtotal Count of Funds: 4

167-73-6707     CA    01    CARTMAN           ERIC         FWS      $  2500      A
                                                           SCHOOL   $  1500      A
                                                           STATE    $  1000      A
                                                           SUB      $  2626      A

Total Count of Student Records: 5

# Indicates students packaged without funds
```

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SYSTEM

Total Number Of Award Letters to be Printed per Student?                                 6

Maximum Number of Award Letters to be Sent per Student?                                  4

Award Letter Type?                                                            Notification

Allow imported Pell EFC to be modified?                                                YES

Packaging Results Default Status?                                                 Accepted

Priority Deadline Date Type?                                                             A

Use Low Tuition?                                                                        NO

Default Housing Plans                                                                   2
```

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                                                                     PAGE:  2
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ACADEMIC YEAR PROFILE

Code:                                         AT
Default:                                      NO
Title:                                        ANY TERM BASED WITH TRAILING SUMMER
Pell Grant Formula:                           Any term-based Credit-hour programs

Program Proration Percent:                                   0%
EFC program length to import from the ISIR database:         9

Term        Enrollment Status
----        -----------------
       Pell %  FSEOG %  Grants %  Perkins %  FWS %  Sub Loans %  Other Loan %
       ------  -------  --------  ---------  -----  -----------  ------------

TERM 1       FULL TIME
        50        50       50         50       50        50            50

TERM 2       FULL TIME
        50        50       50         50       50        50            50

TERM 3       FULL TIME
        0         0        0          0        0         0             0


ACADEMIC YEAR PROFILE

Code:                                         CORR
Default:                                      NO
Title:                                        CORRESPONDENCE STUDY
Pell Grant Formula:                           Correspondence with terms

Program Proration Percent:                                   0%
EFC program length to import from the ISIR database:         9

Term        Enrollment Status
----        -----------------
       Pell %  FSEOG %  Grants %  Perkins %  FWS %  Sub Loans %  Other Loan %
       ------  -------  --------  ---------  -----  -----------  ------------

TERM 1       FULL TIME
       44.12    33.33    33.33      33.33    33.33     33.33         33.33

TERM 2       FULL TIME
       11.76    33.33    33.33      33.33    33.33     33.33         33.33

TERM 3       FULL TIME
       44.12    33.33    33.33      33.33    33.33     33.33         33.33
```

```
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ACADEMIC YEAR PROFILE

Code:                                FP
Default:                             NO
Title:                               FALL PROGRAM
Pell Grant Formula:                  Clock-hour and Credit-hour programs without terms

Program Proration Percent:                                  66.67%
EFC program length to import from the ISIR database:        9

Term        Enrollment Status
----        -----------------
      Pell %  FSEOG %  Grants %  Perkins %   FWS %   Sub Loans %  Other Loan %
      ------  -------  --------  ---------  -------  -----------  ------------

DISB 1      FULL TIME
       41.67       50        50          50       50           50            50

DISB 2      FULL TIME
       41.67       50        50          50       50           50            50

ACADEMIC YEAR PROFILE

Code:                                FPCO
Default:                             NO
Title:                               FALL PROGRAM - CORRESPONDENCE
Pell Grant Formula:                  Correspondence without terms

Program Proration Percent:                                  66.67%
EFC program length to import from the ISIR database:        9

Term        Enrollment Status
----        -----------------
      Pell %  FSEOG %  Grants %  Perkins %   FWS %   Sub Loans %  Other Loan %
      ------  -------  --------  ---------  -------  -----------  ------------

DISB 1      FULL TIME
       41.67       50        50          50       50           50            50

DISB 2      FULL TIME
       41.67       50        50          50       50           50            50

ACADEMIC YEAR PROFILE

Code:                                FS
Default:                             YES
Title:                               2001-2002 FALL/SPRING STANDARD
Pell Grant Formula:                  Standard Term, 30 weeks or more

Program Proration Percent:                                  0%
EFC program length to import from the ISIR database:        9
```

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Term       Enrollment Status
----       -----------------
      Pell %  FSEOG %  Grants %  Perkins %  FWS %  Sub Loans %  Other Loan %
      ------  -------  --------  ---------  -----  -----------  ------------

FALL       FULL TIME
      AUTO        50        50         50     50          50            50

SPRING     FULL TIME
      AUTO        50        50         50     50          50            50

ACADEMIC YEAR PROFILE

Code:                              SP
Default:                           NO
Title:                             SHORT PROGRAM
Pell Grant Formula:                Standard Term, less than 30 weeks

Program Proration Percent:                           80%
EFC program length to import from the ISIR database: 9

Term       Enrollment Status
----       -----------------
      Pell %  FSEOG %  Grants %  Perkins %  FWS %  Sub Loans %  Other Loan %
      ------  -------  --------  ---------  -----  -----------  ------------

TERM 1     FULL TIME
      AUTO        50        50         50     50          50            50

TERM 2     FULL TIME
      AUTO        50        50         50     50          50            50
```

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FUND MAINTENANCE

Fund Code:                       FSEOG
Fund Description:                FEDERAL SEOG
Aid Type:                        E
Criteria:                        UNDERGRADUATES WITH EFC LESS THAN 1000

Beginning Balance  Adjustment to Beginning Balance  Funds Awarded  Current Balance
-----------------  -------------------------------  -------------  ---------------
$         275,000  $                              0 $       35,000 $        240,000

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = FSEOG

 #        Min                Max               Award
---   -----------        ----  -----        -----------
  1   $     2,000        $      3,500       $     1,000
  2   $     3,501        $     99,999       $     2,000

FUND MAINTENANCE

Fund Code:                       FWS
Fund Description:                FEDERAL WORK STUDY
Aid Type:                        W
Criteria:

Beginning Balance  Adjustment to Beginning Balance  Funds Awarded  Current Balance
-----------------  -------------------------------  -------------  ---------------
$         500,000  $                              0 $      102,500 $        397,500

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = FWS

 #        Min                Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                       PELL
Fund Description:                FEDERAL PELL GRANT
Aid Type:                        F
Criteria:

Beginning Balance  Adjustment to Beginning Balance  Funds Awarded  Current Balance
-----------------  -------------------------------  -------------  ---------------
$      99,999,999  $                              0 $       61,050 $     99,938,949

Do not remove if unpackaged? NO
```

```
Award Based on Remaining Need Range Values:
```

```
Fund Code = PELL

 #        Min                Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                  PERKINS
Fund Description:           FEDERAL PERKINS
Aid Type:                   K
Criteria:

Beginning Balance   Adjustment to Beginning Balance   Funds Awarded   Current Balance
-----------------   -------------------------------   -------------   ---------------
$         500,000   $                             0   $      33,000   $       467,000

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = PERKINS

 #        Min                Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                  PLUS
Fund Description:           FEDERAL PLUS LOAN
Aid Type:                   P
Criteria:

Beginning Balance   Adjustment to Beginning Balance   Funds Awarded   Current Balance
-----------------   -------------------------------   -------------   ---------------
$      99,999,999   $                             0   $           0   $    99,999,999

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = PLUS

 #        Min                Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                  SCHOOL
Fund Description:           SCHOOL GRANT
Aid Type:                   G
Criteria:

Beginning Balance   Adjustment to Beginning Balance   Funds Awarded   Current Balance
-----------------   -------------------------------   -------------   ---------------
```

```
$        200,000   $                              0   $      82,714   $        117,286


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***********************************************************************************
Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = SCHOOL

 #       Min                 Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                 STATE
Fund Description:          STATE GRANT
Aid Type:                  G
Criteria:

Beginning Balance   Adjustment to Beginning Balance   Funds Awarded   Current Balance
-----------------   -------------------------------   -------------   ---------------
$        200,000   $                              0   $      42,835   $        157,165

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = STATE

 #       Min                 Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                 SUB
Fund Description:          SUBSIDIZED STAFF LOAN
Aid Type:                  S
Criteria:

Beginning Balance   Adjustment to Beginning Balance   Funds Awarded   Current Balance
-----------------   -------------------------------   -------------   ---------------
$     99,999,999   $                              0   $     139,154   $     99,860,845

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = SUB

 #       Min                 Max               Award
---   -----------        -----------        -----------

FUND MAINTENANCE

Fund Code:                 UNSUB
Fund Description:              UNSUBSIDIZED STAFF LOAN
Aid Type:                      U
Criteria:


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Beginning Balance  Adjustment to Beginning Balance   Funds Awarded   Current Balance
-----------------  -------------------------------   -------------   ---------------
$      99,999,999  $                             0   $      39,048   $    99,960,951

Do not remove if unpackaged? NO

Award Based on Remaining Need Range Values:

Fund Code = UNSUB

 #       Min                 Max                 Award
---  -----------         -----------          -----------
```

```
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*********************************************************************************************

AWARD METHODOLOGY

Code:                                      GRAD
Title:                                     GRADUATE STUDENTS
Priority:                                  2
Use Dollar Amounts (for aid maximums):     NO
Use Percentages (for aid maximums):        YES
Self-Help Aid Maximum:                     100.00
Gift Aid Maximum:                          100.00
Criteria:                        GRADUATE STUDENTS

Fund Code     Fund Priority     School Min     School Max     Min EFC     Max EFC
---------     -------------     ----------     ----------     -------     -------

SCHOOL                    1            200          4,000           0      99,999
SUB                       2            200         99,999           0      99,999
UNSUB                     3            200         99,999           0      99,999


AWARD METHODOLOGY

Code:                                      UG
Title:                                     UNDERGRADUTES
Priority:                                  1
Use Dollar Amounts (for aid maximums):     NO
Use Percentages (for aid maximums):        YES
Self-Help Aid Maximum:                     100.00
Gift Aid Maximum:                          100.00
Criteria:                        UNDERGRADUATE STUDENTS

Fund Code     Fund Priority     School Min     School Max     Min EFC     Max EFC
---------     -------------     ----------     ----------     -------     -------

FSEOG                     1          1,000          2,000           0      99,999
STATE                     2            200          1,000           0      99,999
PERKINS                   3            200          2,000           0       1,000
FWS                       4          1,000          2,500           0      13,500
SCHOOL                    5            500          1,500           0      13,500
SUB                       6            200         99,999           0      99,999

Award Based on Remaining Need Amount Range for Award Methodology UG

Fund Code = FSEOG
```

```
 #       Min                  Max                 Award
---  -----------          -----------          -----------
 1   $      2,000         $    3,500           $     1,000
 2   $      3,501         $   99,999           $     2,000
```

```
BUDGET

Budget Code:                        1
Title:                              1ST YEAR, MUSIC MAJORS, ON CAMPUS
Priority:                           1
Criteria:                           1ST YEAR MUSIC MAJORS OFF CAMPUS

Tuition and Fees Amounts                                             $  6,500
Loan Fees Amounts                                                    $     80
Room and Board Amount                                                $  4,300
Books and Supplies Amount                                            $    800
Transportation Costs Amount                                          $  1,000
Miscellaneous Amount                                                 $    900
COMPUTER EXPENSES                                                    $  1,500
MUSIC FEES                                                           $    650
Budget Total                                                         $ 15,730

BUDGET

Budget Code:                        2
Title:                              1ST YEAR MUSIC MAJORS OFF CAMPUS
Priority:                           2
Criteria:                           1ST YEAR MUSIC MAJORS OFF CAMPUS

Tuition and Fees Amounts                                             $  6,500
Loan Fees Amounts                                                    $     80
Room and Board Amount                                                $      0
Books and Supplies Amount                                            $    800
Transportation Costs Amount                                          $  1,000
Miscellaneous Amount                                                 $  1,500
COMPUTER EXPENSES                                                    $  1,500
MUSIC FEES                                                           $    650
Budget Total                                                         $ 12,030

BUDGET

Budget Code:                        3
Title:                              1ST YEAR UNDERGRADUATE OFF CAMPUS
Priority:                           3
Criteria:                           1ST YEAR UNDERGRADUATE OFF CAMPUS

Tuition and Fees Amounts                                             $  6,500
Loan Fees Amounts                                                    $     80
Room and Board Amount                                                $      0
Books and Supplies Amount                                            $    800
Transportation Costs Amount                                          $  1,000
Miscellaneous Amount                                                 $  1,500
COMPUTER EXPENSES                                                    $  1,500
Budget Total                                                         $ 11,380
```

```
BUDGET

Budget Code:
                                        4

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                                     PACKAGING SETUP
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************************
Title:
Priority:                               1ST YEAR UNDERGRADUATE ON CAMPUS
Criteria:                               4
                                        1ST YEAR UNDERGRADUATE ON CAMPUS
Tuition and Fees Amounts
Loan Fees Amounts
Room and Board Amount                                                  $  6,500
Books and Supplies Amount                                              $     80
Transportation Costs Amount                                            $  4,300
Miscellaneous Amount                                                   $    800
COMPUTER EXPENSES                                                      $  1,000
Budget Total                                                           $    900
                                                                       $  1,500
BUDGET                                                                 $ 15,080

Budget Code:
Title:                                  5
Priority:                               UNDERGRADUATE STUDENTS
Criteria:                               5
                                        UNDERGRADUATE STUDENTS
Tuition and Fees Amounts
Loan Fees Amounts
Room and Board Amount                                                  $  6,500
Books and Supplies Amount                                              $     80
Transportation Costs Amount                                            $  4,300
Miscellaneous Amount                                                   $    800
COMPUTER EXPENSES                                                      $  1,000
Budget Total                                                           $    900
                                                                       $  1,500
BUDGET                                                                 $ 15,080

Budget Code:
Title:                                  6
Priority:                               GRADUATE STUDENTS
Criteria:                               6
                                        GRADUATE STUDENTS
Tuition and Fees Amounts
Loan Fees Amounts
Room and Board Amount                                                  $ 10,000
Books and Supplies Amount                                              $     80
Transportation Costs Amount                                            $      0
Miscellaneous Amount                                                   $  1,200
Budget Total                                                           $  1,000
                                                                       $  1,200
                                                                       $ 13,480
```

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                                     PACKAGING SETUP
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************************

USER DEFINED FORMULAS

Database Table:                         tbl_P_Student
Field Name 1 for Formula 1:             UNMET
Operand for Formula 1:                  -
Database Table:                         tbl_P_Student
Field Name 2 for Formula 1:             REMAINNEED
Results Name for Formula 1:             NEED MET
```

```
                                                                                PAGE: 13
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                                      PACKAGING SETUP
       THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT *************
******************************************************************************************

SAP VALUES
                                                        A
SAP Code 1:                                             SUSPENSION - APPEAL PENDING
SAP Code 1 Description:                                 Y
SAP Code 1 Description - Do Not Package Indicator:


SAP VALUES
                                                        D
SAP Code 1:                                             SUSPENSION - APPEAL DENIED
SAP Code 1 Description:                                 N
SAP Code 1 Description - Do Not Package Indicator:


SAP VALUES
                                                        G
SAP Code 1:                                             GOOD
SAP Code 1 Description:                                 N
SAP Code 1 Description - Do Not Package Indicator:


SAP VALUES
                                                        OK
SAP Code 1:                                             SUSPENSION - APPEAL APPROVED
SAP Code 1 Description:                                 N
SAP Code 1 Description - Do Not Package Indicator:


SAP VALUES
                                                        S
SAP Code 1:                                             SUSPENSION
SAP Code 1 Description:                                 Y
SAP Code 1 Description - Do Not Package Indicator:
```

```
                                                                              PAGE:  1
Report Date: 03/29/2001      U.S. DEPARTMENT OF EDUCATION
Report Time:    15:45:44         EDEXPRESS - 2001-2002
                           STUDENT RECORDS LIST BY FUND CODE                  SORT: SSN
                                       (ALL RECORDS)
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************

                                                                FIRST        AMOUNT    FUND
 FUND      SOCIAL            NAME   TRANS                        NAME        AWARDED   DECISION
 CODE      SECURITY NO.      CODE     #      LAST NAME
--------   -----------       ----   -----   ---------------   -----------   -------   --------
FSEOG      066-75-6265        LI     01     LINDLEY           JENNIFER      $ 2000       A
           115-63-5416        CA     01     CAGE              RICHARD       $ 1000       O
           121-21-2122        NO     00     NORTON            ED            $ 2000       A
           202-59-1871        PR     01     PRICE             LILLIAN       $ 2000       A
           215-59-6471        RI     03     RICHARDS          MARY          $ 2000       A
           254-87-8973        ME     02     MELFI             JENNIFER      $ 2000       A
           280-79-0851        HU     01     HUGLEY            DARRYL        $ 2000       A
           374-84-0003        MA     02     MALONE            SAMUEL        $ 2000       A
           415-05-1550        CO     12     CORTLANDT         VANESSA       $ 2000       A
           451-91-6098        SU     01     SUMMERS           BUFFY         $ 2000       A
           601-86-2818        WI     02     WIGGUM            RALPH         $ 2000       A
           602-10-5690        BO     14     BOIES             AARON         $ 2000       A
           603-71-9006        DU     13     DUNCAN            SABRINA       $ 2000       A
           604-72-4836        DE     13     DELUCCA           FRANK         $ 2000       A
           605-14-4141        NY     03     NYLUND            ROSE          $ 2000       A
           605-79-3403        HA     12     HANCOCK           DENNIS        $ 2000       A
           690-12-9048        WY     02     WYNDHAM           JACQUELINE    $ 2000       A
           690-13-7320        SW     02     SWIFT             SIDNEY        $ 2000       A

                                            Total Funds Awarded:   $35000
                              Subtotal Count of Students Per Fund:      18


                              Total Unduplicated Count of Student Records:        18

                          * - Indicates students that are not packaged
```

```
Report Date: 03/29/2001      U.S. DEPARTMENT OF EDUCATION                   PAGE:  1
Report Time:    15:46:42         EDEXPRESS - 2001-2002
                                UNPACKAGED RECORD LIST
                                     (ALL RECORDS)                          SORT: SSN
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************

  SOCIAL       NAME    TRANS                          FIRST        PACKAGING
SECURITY NO.   CODE      #        LAST NAME            NAME          STATUS       EFC
-----------    ----    -----   -----------------   ------------   ---------   --------
007-00-1970     WE      03     WELBY               MARCUS             N              0
035-09-0081     GE      04     GELLER              MONICA             N          19835
105-71-6346     WO      01     WOO                 LING               N            749
106-81-1398     GA      02     GAMBLE              HELEN              N            517
126-81-5096     ST      03     STEPHENS            SAMANTHA           N            719
160-85-0932     SA      01     SANTOS              ANTHONY            N           9694
163-42-4490     SI      03     SIMPSON             HOMER              N           1364
170-53-7931     RO      01     ROSENBERG           WILLOW             N          18769
170-79-1951     BU      04     BUNDY               KELLY              N              0
171-54-2369     BO      02     BOUVIER             PATTY              N           6672
171-84-7960     PO      02     POWELL              HERBERT            N          25862

                               Total Students:              11
```

```
Report Date: 03/29/2001   U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time:    15:48:44        EDEXPRESS - 2001-2002
                             MEASUREMENT TOOLS - FUNDS
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************

Total Amount of Outside Resources Awarded:                                    0
Total Amount of Other Grants Awarded:                                   125,549
Total Amount of Non-Need Based Grants Awarded:                                0
Total Amount of Federal Pell Grants Awarded:                             61,050
Total Amount of FSEOG Awarded:                                           35,000
Total Amount of Federal Perkins Loan Awarded:                            33,000
Total Amount of Other Work-Study Awarded:                                     0
Total Amount of Federal Work-Study Awarded:                             102,500
Total Amount of Other Need Based Loans Awarded:                               0
Total Amount of Non-Need Based Loans Awarded:                                 0
Total Amount of PLUS Awarded:                                                 0
Total Amount of Subsidized Loans Awarded:                               139,154
Total Amount of Unsubsidized Loans Awarded:                              39,048
Total Amount of Need Based Unsubsidized Loans Awarded:                        0
Total Amount of Chapter 30 VA Benefits/Americorps Awarded:                    0

Total Number of Students Receiving Outside Resources:                         0
Total Number of Students Receiving Other Grants:                             49
Total Number of Students Receiving Non-Need Based Grants:                     0
Total Number of Students Receiving Federal Pell Grant:                       25
Total Number of Students Receiving FSEOG:                                    18
Total Number of Students Receiving Federal Perkins Loan:                     17
Total Number of Students Receiving Other Work-Study:                          0
Total Number of Students Receiving Federal Work-Study:                       41
Total Number of Students Receiving Other Need Based Loans:                    0
Total Number of Students Receiving Non-Need Based Loans:                      0
Total Number of Students Receiving Federal PLUS:                              0
Total Number of Students Receiving Subsidized Loans:                         42
Total Number of Students Receiving Unsubsidized Loans:                        5
Total Number of Students Receiving Need Based Unsubsidized Loans:             0
Total Number of Students Receiving Chapter 30 VA Benefits/Americorps:         0
Total Number of Financial Aid applicants at this School:                    119
Total Number of Students Receiving Financial Aid at this School:             51

Percentage of Students Receiving Outside Resources:                       0.00%
Percentage of Students Receiving Other Grants:                           96.08%
Percentage of Students Receiving Non-Need Based Grants:                   0.00%
Percentage of Students Receiving Federal Pell Grant:                     49.02%
Percentage of Students Receiving FSEOG:                                  35.29%
Percentage of Students Receiving Federal Perkins Loan:                   33.33%
Percentage of Students Receiving Other Work-Study:                        0.00%
Percentage of Students Receiving Federal Work-Study:                     80.39%
Percentage of Students Receiving Other Need Based Loans:                  0.00%
Percentage of Students Receiving Non-Need Based Loans:                    0.00%
Percentage of Students Receiving Federal PLUS:                            0.00%
Percentage of Students Receiving Subsidized Loans:                       82.35%
Percentage of Students Receiving Unsubsidized Loans:                      9.80%
Percentage of Students Receiving Need Based Unsubsidized Loans:           0.00%
Percentage of Students Receiving Chapter 30 VA Benefits/Americorps:       0.00%
```

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```
                                                                          Page 1
Student SSN:    105716346                               Student ID:  105716346 WO 01
                                 WOO, LING L    Current SSN:  105716346  Packaging Status:  N
Name:
                                              Student Status Information
Permanent Address                             ---------------------------------------
------------------------------------------       A/Y Profile          FS Citizenship Sts 1
   Street  1701 NORTH FLAGLER APT 111            College Grade Lvl   4 Housing Plans    2
   City   WASHINGTON                             Dependency Status   I Default Status   N
   State  DC  Zip Code       20090               State Residency    FL SAP
   Home Telephone No                             Award Method.         Prior Degree     N
                                                 Auto Zero EFC       N Borrower Based   N
Local Address                                    Simplified Needs    Y Pell Elig. Flag  Y
----------------------------                     Low Tuition

   Street                                     Interested In          Verification
   City                                       ---------------------  ---------------
   State    Zip Code                             Employment          Y Code              N
   Local Telephone No                            Student Loan        Y Pell Status       N


 Needs Analysis
 ---------------------------                  Enrollment
   Budget                  15080              Term       Status
    -EFC                     749              ----------------
                         -------                FALL          FULL TIME
   =Unmet Need             14331                SPRING        FULL TIME
   -Awarded Funds              0
   -Unsub, Plus, NNB           0
                         -------
   =Remaining Need        14,331
                                              Record Status
   Overaward Indicator         N              --------------------------------------
   Pell EFC                  749                 Pkg Results          Packaging Status N
   Estimated Pell Award     2550                 Record Source      I External Export  Y
                                                 Ready Date
 EFC Values                                      Packaged Date
 ---------------------------                     Processed Date              08/10/2001
   Parent Contribution           0               Received Date               07/27/2001
   FISAP Total Income (FTI)   9892               Last Modified By      PACK  03/29/2001

 Aggregate Loan Amounts
 ---------------------------
   Direct Subsidized         12624
   Direct Unsubsidized        1220
   Perkins                       0
```

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```
                                                                             Page 2
                                                       Student ID:  105716346 WO 01
Student SSN:    105716346
                                      Current SSN:  105716346  Packaging Status:  N
                          WOO, LING L
Name:
-----------------------------------------------------------------------------------
Awarded Funds
-----------------------------------------------------------------------------------
-----------------                                    CURRENT   PREVIOUS  ORIGINAL
INSTITUTE  FUND                                       TOTAL     TOTAL     TOTAL
FUNDS      DEC.  FALL    SPRING   N/A    N/A    N/A
-----------------------------------------------------------------------------------
-----------------                                      0         0         0
                  0        0       0      0      0

-----------------------------------------------------------------------------------
                                                       0         0         0
TOTAL             0        0       0      0      0

Last Award Letter Information
------------------------------  --------------
                                  4
Award Letter #                    Y
Award Letter Print Indicator      03/15/2001
Award Letter Print Date           N
Award Letter Received?
Award Letter Received Date

-----------------------------------------------------------------------------------
Budget:       UNDERGRADUATE STUDENTS            5
---------- ------------------------------------------------------------------------
                                COMPUTER EXPENSES                        1500
Tuition and Fees          6500
Loan Fees                   80
Room and Board            4300
Books and Supplies         800
Transportation Costs      1000
Miscellaneous              900                                          15080
                                       Total

-----------------------------------------------------------------------------------
User-Defined Formulas
-----------------------------------------------------------------------------------
                                                      Result
   Formula                                                                 0
-----------------------------------------------------------------------------------
1 UNMET - REMAINNEED
```

```
                                                                      PAGE:  1
Report Date: 03/29/2001   U.S. DEPARTMENT OF EDUCATION
Report Time:    15:50:13       EDEXPRESS - 2001-2002
                                 Record Layout
                      Record Layout - Change Field Numbers
*******************************************************************************
Change Field No.          Field Length        Field Description
----------------          ------------        ------------------------
    0004                       12             Student's First Name
    0005                        1             Middle Initial
    0006                       16             Student's Last Name
    0007                        9             Student's Current SSN No.
    0008                       35             Permanent Mailing Address
    0009                       16             Student's Permanent City
    0010                        2             Student's Permanent State
    0011                        9             Student's Permanent Zip Code
    0012                       35             Local Address
    0013                       16             Local Address City
    0014                        2             Local Address State
    0015                        9             Local Zip Code
    0016                       10             Student's Permanent Phone No.
    0017                       20             Student's Driver's License No.
    0018                        2             Student's Driver's License State Code
    0019                        2             Student's State of Legal Residence
    0020                        8             Student's Date of Birth
    0022                        5             EFC
    0023                        4             Academic Year Profile Code
    0024                        1             Default Status Indicator
    0025                        2             SAP Indicator
    0026                        4             Budget Code
    0027                        1             Dependency Status
    0028                        1             Student is Selected for Verification
    0029                        1             Enrollment Status Term 1
    0030                        1             Enrollment Status Term 2
    0031                        1             Enrollment Status Term 3
    0032                        1             Enrollment Status Term 4
    0033                        1             Enrollment Status Term 5
    0037                        8             Total Income
    0039                        1             College Grade Level
    0040                        1             Housing Plans
    0043                        1             Interested in Student Employment?
    0044                        1             Interested in Student Loans?
    0045                        6             Aggregate Subsidized Loan Amount
    0046                        6             Aggregate Unsubsidized Loan Amount
    0047                        6             Aggregate Perkins Loan Amount
    0052                        1             Packaging Result
    0292                        1             Automatic Zero EFC
    0294                        5             Pell EFC
    0295                       10             Local Phone Number
    0296                        1             Pell Verification Status
    0298                        1             Simplified Needs Indicator
    0299                        8             Transaction Processed Date
    0300                        1             Prior Degree
    0301                        1             Pell Eligiblity Flag
    0302                        8             Application Received Date
    0303                        5             Parent Contribution
    0304                        1             Low Tuition
    0305                        1             Print Letter in Next Batch
```

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Report Date: 03/29/2001  U.S. DEPARTMENT OF EDUCATION             PAGE:  1
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                                Record Layout
                  Record Layout - Import Add Fund Amounts
*********************************************************************************
Field   Field                                        Start       End
No.     Length       Field Description               Position    Position
-----   ------       ------------------------        --------    --------
    1        9       ORIGSSN                                1           9
    2        2       Name ID                               10          11
    3        2       Transacation Number                   12          13
    4        5       Sequence Number                       14          18
    5        8       Fund Code 1                           19          26
    6        5       Fund Value 1                          27          31
    7        8       Fund Code 2                           32          39
    8        5       Fund Value 2                          40          44
    9        8       Fund Code 3                           45          52
   10        5       Fund Value 3                          53          57
   11        8       Fund Code 4                           58          65
   12        5       Fund Value 4                          66          70
   13        8       Fund Code 5                           71          78
   14        5       Fund Value 5                          79          83
   15        8       Fund Code 6                           84          91
   16        5       Fund Value 6                          92          96
   17        8       Fund Code 7                           97         104
   18        5       Fund Value 7                         105         109
   19        8       Fund Code 8                          110         117
   20        5       Fund Value 8                         118         122
   21        8       Fund Code 9                          123         130
   22        5       Fund Value 9                         131         135
   23        8       Fund Code 10                         136         143
   24        5       Fund Value 10                        144         148
***** Record Length = 148
```

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Report Date: 03/29/2001   U.S. DEPARTMENT OF EDUCATION                  PAGE:  1
Report Time:    15:49:20      EDEXPRESS - 2001-2002
                                 Record Layout
                      Record Layout - Import External Add
***************************************************************************
Field  Field                                             Start       End
No.    Length  Field Description                         Position    Position
-----  ------  -----------------------                   --------    --------
  1       9    Original Social Security Number                1           9
  2       2    Name ID                                       10          11
  3       2    Transaction Number                            12          13
  4       9    Current Social Security Number                14          22
  5      16    Last Name                                     23          38
  6      12    First Name                                    39          50
  7       1    Middle Initial                                51          51
  8      35    Permanent Address                             52          86
  9      16    Permanent Address City                        87         102
 10       2    Permanent Address State                      103         104
 11       9    Permanent Zip Code                           105         113
 12      10    Permanent Phone Number                       114         123
 13      35    Local Address                                124         158
 14      16    Local Address City                           159         174
 15       2    Local Address State                          175         176
 16       9    Local Zip Code                               177         185
 17      10    Local Phone Number                           186         195
 18       1    College Grade Level                          196         196
 19       4    Academic Year Profile Code                   197         200
 20       1    Dependency Status                            201         201
 21       4    Budget Code                                  202         205
 22       5    EFC                                          206         210
 23       1    Pell Verification Status                     211         211
 24       1    Student is Selected for Verification         212         212
 25       5    Parent Contribution                          213         217
 26       8    Total Income                                 218         225
 27       1    Enrollment Status Term 1                     226         226
 28       1    Enrollment Status Term 2                     227         227
 29       1    Enrollment Status Term 3                     228         228
 30       1    Enrollment Status Term 4                     229         229
 31       1    Enrollment Status Term 5                     230         230
 32       1    Housing Plans                                231         231
 33       2    SAP Indicator                                232         233
 34       1    Default Status Indicator                     234         234
 35       1    Interested In Employment?                    235         235
 36       1    Interested In Student Loan?                  236         236
 37       2    State of Legal Residence                     237         238
 38       1    Borrower Based Indicator                     239         239
 39       8    Transaction Processed Date                   240         247
 40       1    Simplified Needs Indicator                   248         248
 41       1    Overaward Indicator                          249         249
 42       5    Pell EFC                                     250         254
 43       1    Automatic Zero EFC                           255         255
 44       1    Update Demo Record Flag                      256         256
 45       1    Prior Degree?                                257         257
 46       1    Pell Eligibility Flag                        258         258
 47       8    Application Received Date                    259         266
 48       1    Low Tuition                                  267         267
 49       6    Aggregate Subsidized Loan Amount             268         273
```

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Report Time:   15:49:20       EDEXPRESS - 2001-2002
                                 Record Layout
                     Record Layout - Import External Add
*******************************************************************************
Field  Field                                            Start       End
No.    Length  Field Description                        Position    Position
-----  ------  -------------------------                --------    --------
 50       6    Aggregate Unsubsidized Loan Amount         274         279
 51       6    Aggregate Perkins Loan Amount              280         285
***** Record Length = 285
```

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Report Date: 03/29/2001   U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time:    15:49:43       EDEXPRESS - 2001-2002
                                     Record Layout
                         Record Layout - Import External Change
*****************************************************************************
Field   Field                                          Start        End
No.     Length         Field Description               Position     Position
-----   ------         ------------------------        --------     --------
    1        9         Original SSN                           1            9
    2        2         NameID                                10           11
    3        2         Transaction Number                    12           13
    4        2         Sequence Numbers                      14           15
    5        4         Change Field Number 1                 16           19
    6       35         Value 1                               20           54
    7        4         Change Field Number 2                 55           58
    8       35         Value 2                               59           93
    9        4         Change Field Number 3                 94           97
   10       35         Value 3                               98          132
   11        4         Change Field Number 4                133          136
   12       35         Value 4                              137          171
   13        4         Change Field Number 5                172          175
   14       35         Value 5                              176          210
   15        4         Change Field Number 6                211          214
   16       35         Value 6                              215          249
   17        4         Change Field Number 7                250          253
   18       35         Value 7                              254          288
   19        4         Change Field Number 8                289          292
   20       35         Value 8                              293          327
   21        4         Change Field Number 9                328          331
   22       35         Value 9                              332          366
   23        4         Change Field Number 10               367          370
   24       35         Value 10                             371          405
***** Record Length = 405
```

Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
AAI: ADJUSTED AVAILABLE INCOME	Valid values are -9999999 to 9999999 and blank.	8
ADD DATE - ISIR	Valid values are CCYYMMDD.	8
AGE OF OLDER PARENT	Valid values are 00-99 and blank.	2
AI: AVAILABLE INCOME	Valid values are -9999999 to 9999999 and blank.	8
ALIEN REGISTRATION NUMBER	Valid values are 000000001-999999999 and blank.	9
APA: ASSET PROTECTION ALLOWANCE	Valid values are 000000000 to 999999999 and blank.	9
APPLICATION RECEIPT DATE	Valid values are 20010101 to 20021231.	8
APPLICATION SOURCE SITE CODE	Valid values are 11 = Electronic App, 21 = Electronic Renewal App, 41 = FAFSA Express, 52,53,55,56 = MDE Mt. Vernon, 61 = FAFSA on the Web, 62 = Renewal FAFSA on the Web, and 71 = CPS ADE.	2
ARE YOU MALE?	Valid values are 1 = Yes, 2 = No, and blank.	1
ASSUMED CITIZENSHIP	Valid values are 1 = Assumed citizen, 2 = Assumed eligible non-citizen and blank.	1
ASSUMED DATE OF BIRTH PRIOR	Valid values are 1 = Assumed Yes, 2 = Assumed No, and blank.	1
ASSUMED FATHER'S INCOME FROM WORK	Valid values are -999999 to 999999 and blank.	7
ASSUMED FATHER'S SSN	Valid values are 000000000 to 999999999 and blank.	9
ASSUMED HAVE CHILDREN YOU SUPPORT?	Valid values are 1 = Assumed Yes, 2 = Assumed No, and blank.	1
ASSUMED HAVE LEGAL DEP OTHER THAN CHILDREN/SPOUSE	Valid values are 2 = Assumed no legal dependents and blank.	1
ASSUMED MOTHER'S INCOME FROM WORK	Valid values are -999999 to 999999 and blank.	7
ASSUMED MOTHER'S SSN	Valid values are 000000000 to 999999999 and blank.	9
ASSUMED PARENTS' # IN COLLEGE	Valid values are 0 to 9 and blank.	1

Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
ASSUMED PARENTS' # IN FAMILY	Valid values are 00 to 99 and blank.	2
ASSUMED PARENTS' AGI	Valid values are -999999 to 999999 or blank.	7
ASSUMED PARENTS' MARITAL STATUS	Valid values are 1 = Assumed married/remarried, 2 = Assumed single and blank.	1
ASSUMED PARENTS' TOTAL FROM WORKSHEET C	Valid values are 00000 to 99999 and blank.	5
ASSUMED PARENTS' U.S. TAX PAID	Valid values are 000000 to 999999 and blank.	6
ASSUMED SPOUSE'S INCOME FROM WORK	Valid values are -999999 to 999999 and blank.	7
ASSUMED STUDENT IS MARRIED/REMARRIED	Valid values are 1 = Assumed Yes, 2 = Assumed No, and blank.	1
ASSUMED STUDENT'S # IN COLLEGE	Valid values are 0 to 9 and blank.	1
ASSUMED STUDENT'S # IN FAMILY	Valid values are 00 to 99 and blank.	2
ASSUMED STUDENT'S AGI	Valid values are -999999 to 999999 and blank.	7
ASSUMED STUDENT'S INCOME FROM WORK	Valid values are -999999 to 999999 and blank.	7
ASSUMED STUDENT'S MARITAL STATUS	Valid values are 1 = Assumed unmarried, 2 = Assumed married/remarried and blank.	1
ASSUMED STUDENT'S TOTAL FROM WORKSHEET C	Valid values are 00000 to 99999 and blank.	5
ASSUMED STUDENT'S U.S. TAX PAID	Valid values are 00000 to 99999 and blank.	5
ASSUMED VETERAN OF U.S. ARMED FORCES	Valid values are 2 = Assumed not a veteran and blank.	1
ASSUMPTION OVERRIDE 1	Valid values are 1=Yes and blank.	1
ASSUMPTION OVERRIDE 2	Valid values are 1 = Yes and blank.	1
ASSUMPTION OVERRIDE 3	Valid values are 1=Yes and blank.	1
ASSUMPTION OVERRIDE 4	Valid values are 1=Yes and blank.	1
ASSUMPTION OVERRIDE 5	Valid values are 1=Yes and blank.	1

Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
ASSUMPTION OVERRIDE 6	**Valid values are 1=Yes and blank.**	1
ATI: ALLOWANCES AGAINST TOTAL INCOME	Valid values are 0000000 to 9999999 and blank.	7
AUTOMATIC ZERO EFC	Valid values are Y = EFC set to zero based on income criteria and Blank = Flag not set.	1
BATCH ID	Valid values are 2 characters for Batch Type (#A = Electronic App ISIRs, #B = Renewal App, #C = Correction / Duplicate ISIRs, #F = FDR ISIRs, #G = System Generated ISIRs, #I =YTD ISIRs, #K = State Agency Non-Resident ISIRs, #L = Full State Agency Resident ISIRs, #S = Signature ISIRs, #Y = Reprocessed Records, #Z = CPS System generated), 1 digit Cycle Year = 2, 6 characters for Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format	23
BATCH YEAR	Valid values are 2 (for 2001-2002).	1
BORN BEFORE 01/01/1978?	Valid values are 1 = Yes, 2 = No, and blank.	1
CAI: CONTRIBUTION FROM AVAILABLE INCOME	Valid values are -9999999 to 9999999 or blank.	8
CITIZENSHIP STATUS	Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank.	1
COMMENT CODES	Valid values are: See EDE Technical Reference.	80
CORRECTION APPLIED AGAINST TRANSACTION NUMBER	Valid values are 01 - 99 and blank.	2
CPS COMPUTE BATCH NUMBER	Valid values are 000-999.	3
DATE APPLICATION COMPLETED	Valid values are 20010101 to 20021231.	8
DATE OF BIRTH	Valid values are 19000101 to 19991231 and Blank.	8

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Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
DEGREE/CERTIFICATE	Valid values are 1 = 1st Bachelor's Degree, 2 = 2nd Bachelor's Degree, 3 = Associate Degree (occupational or technical program), 4 = Associate Degree (general education or transfer program), 5 = Certificate or diploma for completing an occupational, technical, or educational program of less than two years, 6 = Certificate or Diploma for completing an occupational, technical, or educational program of at least two years, 7 = Teaching Credential Program (non-degree program), 8 = Graduate or Professional Degree, 9 = Other/Undecided, and Blank.	1
DEPENDENCY OVERRIDE	Valid values are 1 = Override, 2 = Cancel dependency override, 3 = Override failed, and blank = No overrride.	1
DEPENDENCY STATUS	Valid values are I = Independent, D = Dependent, X = Rejected Dependent, Y = Rejected Independent.	1
DNW: DISCRETIONARY NET WORTH	Valid values are -999999999 to 999999999 and blank.	10
DRIVER'S LICENSE NUMBER	Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank.	20
DRIVER'S LICENSE STATE CODE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
DRN	Valid values are 0000 to 9999 or blank.	4
DRUG CONVICTION AFFECTING ELIGIBILITY?	Valid values are 1=No, 2=Yes(Part-Year), 3 =Yes/Don't know, and Blank.	1
DUPLICATE DATE	Valid values are 20010101 to 20021231 and blank.	8
DUPLICATE REQUEST INDICATOR	Valid values are D=duplicate request and blank=no duplicate request.	1
DUPLICATE SSN FLAG	Valid values are Y = Another filer also using this SSN and blank = No other person using this SSN.	1
EA: EMPLOYMENT ALLOWANCE	Valid values are 0000000 to 9999999 and blank.	7

Appendix E — Query Fields

App Express Module Field Name	 Valid Values	 Length
EARLY ANALYSIS FLAG	Valid values are 1 = Early Applicant and blank = Not an Early Applicant.	1
EFC	Valid values are 00000-99999 and blank.	5
EFC CHANGE FLAG	Valid values are 1 = EFC increase, 2 = EFC decrease, and Blank = No change.	1
ELECTRONIC FEDERAL SCHOOL CODE INDICATOR	Valid values are 1 = College Choice 1, 2 = College Choice 2, 3 = College Choice 3, 4 = College Choice 4, 5 = College Choice 5, 6 = College Choice 6 and blank.	1
ELECTRONIC VERSION NUMBER	Valid values are V00000-V99999.	6
ENROLLMENT PLAN FALL SEMESTER OR QUARTER 2001	Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank.	1
ENROLLMENT PLAN SPRING SEMESTER OR QUARTER 2002	Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank.	1
ENROLLMENT PLAN SUMMER TERM 2001	Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank.	1
ENROLLMENT PLAN SUMMER TERM 2002	Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank.	1
ENROLLMENT PLAN WINTER QUARTER 2001	Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank.	1
ENROLLMENT STATUSES	Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank.	9
ETI DESTINATION CODE	Valid values are TG00000-TG99999.	7
FAA ADJUSTMENT	Valid values are 1 = EFC Adjustment Processed, 2 = EFC Adjustment request failed, and blank.	1

Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
FATHER'S GRADE LEVEL COMPLETED	Valid values are 1=Middle School/Jr. High, 2=High School, 3=College or Beyond, 4=Other/Unknown and blank.	1
FATHER'S INCOME EARNED FROM WORK	Valid values are -999999 to 999999 and blank.	7
FATHER'S/STEPFATHER'S LAST NAME	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	16
FATHER'S/STEPFATHER'S SSN	Valid values are 000000000 to 999999999 and blank.	9
FEDERAL SCHOOL CODE 1	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
FEDERAL SCHOOL CODE 2	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
FEDERAL SCHOOL CODE 3	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
FEDERAL SCHOOL CODE 4	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
FEDERAL SCHOOL CODE 5	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
FEDERAL SCHOOL CODE 6	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
FEDERAL SCHOOL CODES 1-6	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	41
FIRST BACHELOR'S DEGREE BY 07/01/2001?	Valid values are 1 = Yes, 2 = No, and blank.	1
FIRST NAME	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	12
FTI: FISAP TOTAL INCOME	Valid values are -9999999 to 9999999 or blank.	8
GRADE LEVEL IN COLLEGE	Valid values are 0 = 1st year, never attended college, 1 = 1st year, attended college before, 2 = 2nd year/sophomore, 3 = 3rd year/junior, 4 = 4th year/senior, 5 = 5th year/other undergraduate, 6 = 1st year graduate/professional, 7 = Continuing graduate/professional, and Blank.	1

Appendix E — Query Fields

App Express Module		
Field Name	Valid Values	Length
HAVE CHILDREN YOU SUPPORT?	Valid values are 1 = Yes, 2 = No, and blank.	1
HAVE LEGAL DEPENDENTS OTHER THAN CHILDREN OR SPOUS	Valid values are 1 = Yes, 2 = No, and blank.	1
HIGH SCHOOL DIPLOMA OR GED RECEIVED?	Valid values are 1 = Yes, 2 = No, and blank.	1
HOUSING PLANS 1	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
HOUSING PLANS 1-6	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	11
HOUSING PLANS 2	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
HOUSING PLANS 3	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
HOUSING PLANS 4	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
HOUSING PLANS 5	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
HOUSING PLANS 6	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
IMPORTED AS PLUS LOAN	Valid values are Y=Yes and blank.	1
IMPORTED AS SUB LOAN	Valid values are Y=Yes and blank.	1
IMPORTED AS UNSUB LOAN	Valid values are Y=Yes and blank.	1
INPUT RECORD TYPE	Valid values are C = Correction Application, D = Duplicate Request, H = History Correction, R = Renewal FAFSA/ Renewal FAFSA on the Web, S = FAFSA Express or FAFSA on the Web Application, and Blank = Initial Application.	1
INS MATCH FLAG	Valid values are Y = Citizenship confirmed, N = Citizenship not confirmed, and Blank = No match performed.	1

Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
INS SECONDARY MATCH FLAG	Valid values are Y = Citizenship confirmed, N = Citizenship not confirmed, P = Pending INS processing, and blank.	1
INS VERIFICATION NUMBER	Valid values are 000000000000000 to 999999999999999 and blank.	15
INTERESTED IN STUDENT EMPLOYMENT?	Valid values are 1 = Yes, 2 = No, and blank.	1
INTERESTED IN STUDENT LOANS?	Valid values are 1 = Yes, 2 = No, and blank.	1
IPA: INCOME PROTECTION ALLOWANCE	Valid values are 0000000 to 9999999 and blank.	7
IS STUDENT MARRIED?	Valid values are 1 = Yes, 2 = No, and blank.	1
ISIR TRANSACTION TYPE	Valid values are 0 = Elec. Initial App., 1 = Automatic ISIR, 2 = Elec. Corr., 3 = Elec. Dup. Request, and 5 = Elec. Renewal App.	1
LAST NAME	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	16
LEGAL RESIDENCE DATE	Valid values are 190001 to 200212 and Blank.	6
MIDDLE INITIAL	Valid values are A-Z and blank.	1
MONTHLY VA EDUCATION BENEFITS	Valid values are 000 to 999 and blank.	4
MOTHER'S GRADE LEVEL COMPLETED	Valid values are 1=Middle School/Jr. High, 2=High School, 3=College or Beyond, 4=Other/Unknown and blank.	1
MOTHER'S INCOME EARNED FROM WORK	Valid values are -999999 to 999999 and blank.	7
MOTHER'S/STEPMOTHER'S LAST NAME	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	16
MOTHER'S/STEPMOTHER'S SSN	Valid values are 000000000 to 999999999 and blank.	9
MULTIPLE SCHOOL CODE FLAGS	Valid values are Y = Yes and blank.	6
NO. OF MONTHS VA BENEFITS RECEIVED	Valid values are 00-12 and blank.	2

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App Express Module

Field Name	Valid Values	Length
NSLDS DATABASE RESULTS FLAG	Valid Values are 1 = Record matched and data sent, 2 = SSN match, no name or date of birth match, no data sent, 3 = SSN not found in NSLDS, 4 = Full match, no relevant data to send.	1
NSLDS MATCH FLAG	Valid values are 1 = Eligible for Title IV Aid, 2 = Default, 3 = Overpayment, 4 = Default and Overpayment, 7 = Match but no data provided, and 8 = Record not sent to NSLDS.	1
NSLDS TRANSACTION NUMBER	Valid values are 01 to 99.	2
NW: EFC NET WORTH	Valid values are 000000000 to 999999999 and blank.	9
ORIGINAL NAME ID	Valid values are Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	2
ORIGINATING FEDERAL SCHOOL CODE	Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999.	6
ORPHAN OR WARD OF COURT?	Valid values are 1 = Yes, 2 = No, and blank.	1
PAID EFC	Valid values are 00000-99999 and blank.	5
PAID EFC TYPE	Valid values are P = Primary EFC, S = Secondary EFC, and Blank = None calculated.	1
PARENTS' ADJUSTED GROSS INCOME	Valid values are -999999 to 999999 and blank.	7
PARENTS' BUSINESS/FARM NET WORTH	Valid values are 000000 to 999999 and blank.	6
PARENTS' CALCULATED TAX STATUS	Valid values are 1, 2, or 3 = Tax Filer, 4 or 5 = Non-Tax Filer, and Blank.	1
PARENTS' CASH, SAVINGS, AND CHECKING	Valid values are 000000 to 999999 and blank.	6
PARENTS' ELIGIBLE TO FILE 1040A OR 1040EZ?	Valid values are 1 = Yes, 2 = No, 3 = Don't know, and Blank.	1
PARENTS' EXEMPTIONS CLAIMED	Valid values are 00-99 and blank.	2
PARENTS' INVESTMENT NET WORTH	Valid values are 000000-999999 and blank.	6
PARENTS' LEGAL RESIDENCE DATE	Valid values are 190001 to 200212 and Blank.	6
PARENTS' LEGAL RESIDENTS BEFORE 01/01/1996?	Valid values are 1 = Yes, 2 = No and blank.	1

App Express Module		
Field Name	Valid Values	Length
PARENTS' MARITAL STATUS	Valid values are 1 = Married/Remarried, 2 = Single, 3 = Divorced/Separated, 4 = Widowed, and blank.	1
PARENTS' NUMBER IN COLLEGE	Valid values are 1 to 9 and blank.	1
PARENTS' NUMBER OF FAMILY MEMBERS	Valid values are 01 to 99 and blank.	2
PARENTS' STATE OF LEGAL RESIDENCE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
PARENTS' TAX RETURN FILED?	Valid values are 1 = Completed, 2 = Will file, 3 = Will not file, and Blank.	1
PARENTS' TOTAL FROM WORKSHEET A	Valid values are 00000 to 99999 and blank.	5
PARENTS' TOTAL FROM WORKSHEET B	Valid values are 00000 to 99999 and blank.	5
PARENTS' TOTAL FROM WORKSHEET C	Valid values are 00000 to 99999 and blank.	5
PARENTS' TYPE OF TAX RETURN USED?	Valid values are 1 = 1040, 2 = 1040A,1040EZ,1040Telefile, 3 = Foreign Tax Return, 4=Tax return from Puerto Rico, Guam, American Samoa, the Virgin Islands, Marshall Islands, the Federate States of Micronesia or Palau, and Blank.	1
PARENTS' U.S. INCOME TAX PAID	Valid values are 000000 to 999999 and blank.	6
PC: PARENTS' CONTRIBUTION	Valid values are 0000000 to 9999999 and blank.	7
PCA: PARENTS' CONTRIBUTION FROM ASSETS	Valid values are -9999999 to 9999999 and blank.	8
PELL GRANT ELIGIBILITY FLAG	Valid values are Y = This transaction determined eligible for a Federal Pell Grant and Blank = This transaction determined ineligible for a Federal Pell Grant.	1
PERMANENT ADDRESS	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	35
PERMANENT CITY	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	16

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App Express Module		
Field Name	**Valid Values**	**Length**
PERMANENT PHONE NUMBER	Valid values are 0000000000 to 9999999999 and blank.	10
PERMANENT STATE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
PERMANENT ZIP CODE	Valid values are 00000-99999 and blank.	5
PREPARER'S EIN	Valid values are 000000000 to 999999999 and blank.	9
PREPARER'S SIGNATURE	Valid values are 1=Yes and blank.	1
PREPARER'S SSN	Valid values are 000000000 to 999999999 and blank.	9
PRIMARY ALTERNATE MONTH 1	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 10	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 11	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 12	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 2	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 3	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 4	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 5	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 6	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 7	Valid values are 00000-99999 and blank.	5
PRIMARY ALTERNATE MONTH 8	Valid values are 00000-99999 and blank.	5
PRIMARY EFC TYPE	Valid values are 1 = FNT: Dependent, 2 = FNT: Independent without dependents other than a spouse, 3 = FNT: Independent with dependents other than a spouse, 4 = SNT: Dependent, 5 = SNT: Independent without dependents other than a spouse, 6 = SNT: Independent with dependents other than a spouse, and Blank = None Calculated.	1

Appendix E — Query Fields

App Express Module		
Field Name	Valid Values	Length
PRISONER MATCH FLAG	Valid values are 1 = Prisoner in Local Facility, 2 = Prisoner in State or Federal Facility, 8 = Not Sent to Match, and Blank = Not Sent to Match or Not a Prisoner	1
RECORD TYPE	Valid values are C = Correction Application, H = History Correction and blank = Initial/Renewal Appliation	1
REGISTER FOR SELECTIVE SERVICE?	Valid values are 1 = Yes, 2 = No, and blank.	1
REJECT OVERRIDE B	Valid values are 1 = Yes and blank.	1
REJECT OVERRIDE N	Valid values are 1 = Yes and blank.	1
REJECT OVERRIDE W	Valid values are 1 = Yes and blank.	1
REJECT REASON CODES	Valid values: See Processing Codes/System Requirements section of the EDE Technical Reference for specific code tables and details.	21
REPROCESSED REASON CODE	Valid values are 01 to 99 and blank.	2
SAR ACKNOWLEDGEMENT COMMENT CODES	Valid values are: See EDE Technical Reference.	20
SAR C FLAG	Valid values are Y = C flag set, resolution required on one or more match results and Blank = No flag set.	1
SATI: STUDENT'S ALLOWANCE AGAINST TOTAL INCOME	Valid values are -9999999 to 9999999 and blank.	8
SCA: STUDENT'S CONTRIBUTION FROM ASSETS	Valid values are -999999 to 999999 and blank.	7
SDNW: STUDENT'S DISCRETIONARY NET WORTH	Valid values are -999999999 to 999999999 and blank.	10
SEC AAI: SECONDARY ADJUSTED AVAILABLE INCOME	Valid values are -9999999-9999999 and blank.	8
SEC AI: SECONDARY AVAILABLE INCOME	Valid values are -9999999-9999999 and blank.	8
SEC APA: SECONDARY ASSET PROTECTION ALLOWANCE	Valid values are 000000000-999999999 and blank.	9
SEC ATI: SECONDARY ALLOWANCE AGAINST TOTAL INCOME	Valid values are 0000000-9999999 and blank.	7
SEC CAI: SECONDARY CONTRIBUTION FROM AVAILABLE INC	Valid values are -9999999-9999999 and blank.	8

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App Express Module

Field Name	Valid Values	Length
SEC DNW: SECONDARY DISCRETIONARY NET WORTH	Valid values are -999999999-999999999 and blank.	10
SEC EA: SECONDARY EMPLOYMENT ALLOWANCE	Valid values are 0000000-9999999 and blank.	7
SEC FTI: SECONDARY FISAP TOTAL INCOME	Valid values are -999999-999999 and blank.	7
SEC IPA: SECONDARY INCOME PROTECTION ALLOWANCE	Valid values are 0000000-9999999 and blank.	7
SEC NW: SECONDARY NET WORTH	Valid values are 000000000-999999999 and blank.	9
SEC PC: SECONDARY PARENTS CONTRIBUTION	Valid values are 0000000-9999999 and blank.	7
SEC PCA: SECONDARY PARENT'S CONTRIBUTION ASSETS	Valid values are -999999-999999 and blank.	7
SEC SATI: SECONDARY STD'S ALLOW AGAINST TOTAL INC	Valid values are -99999999-99999999 and blank.	9
SEC SCA: SECONDARY STUDENT'S ASSET CONTRIBUTION	Valid values are -999999-999999 and blank.	7
SEC SDNW: SECONDARY DISCRETIONARY NET WORTH (STUD)	Valid values are -99999999-99999999 and blank.	9
SEC SIC: SECONDARY DEP STUDENT'S INC CONTRIBUTION	Valid values are 0000000-999999 and blank.	7
SEC STI: SECONDARY STUDENT'S TOTAL INCOME	Valid values are -9999999 to 9999999 and blank.	8
SEC STX: SECONDARY STATE TAX ALLOWANCE	Valid values are -9999999-9999999 and blank.	8
SEC TI: SECONDARY TOTAL INCOME	Valid values are -9999999-9999999 and blank.	8
SEC TPC: SECONDARY TOTAL PARENT CONTRIBUTIONS	Valid values are 0000000-9999999 and blank.	7
SEC TSC: SECONDARY TOTAL STUDENT CONTRIBUTIONS	Valid values are 0000000-9999999 and blank.	7
SECONDARY ALTERNATE MONTH 1	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 10	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 11	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 12	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 2	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 3	Valid values are 00000-99999 and blank.	5

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App Express Module		
Field Name	**Valid Values**	**Length**
SECONDARY ALTERNATE MONTH 4	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 5	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 6	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 7	Valid values are 00000-99999 and blank.	5
SECONDARY ALTERNATE MONTH 8	Valid values are 00000-99999 and blank.	5
SECONDARY EFC	Valid values are 00000-99999 and Blank = None calculated.	5
SECONDARY EFC TYPE	Valid values are 1 = FNT: Dependent, 2 = FNT: Independent without dependents other than a spouse, 3 = FNT: Independent with dependents other than a spouse, 4 = SNT: Dependent, 5 = SNT: Independent without dependents other than a spouse, 6 = SNT: Independent with dependents other than a spouse, and Blank = None Calculated.	1
SELECTED FOR VERIFICATION	Valid values are Y = Selected, N = Not Selected, and * = Subsequent Transaction was selected for verification.	1
SELECTIVE SERVICE MATCH FLAG	Valid values are Y = status confirmed, N = status not confirmed, T = temp. exempt, and blank = record not sent to SS.	1
SELECTIVE SERVICE REGISTRATION FLAG	Valid values are Y = Reg. Completed, N = Reg. Not Completed, T = Temp. Exempt, and blank = record not sent to SS.	1
SERIAL NUMBER	Valid values are 00001 to 99999.	5
SIC: DEPENDENT STUDENTS' INCOME CONTRIBUTION	Valid values are 0000000 to 9999999 and blank.	7
SIGNED BY	Valid values are A = Applicant, B = Applicant and Parent, P = Parent, and Blank.	1
SIMPLIFIED NEEDS TEST (SNT)	Valid values are Y = SNT met, N = SNT not met or insufficient information to determine SNT eligibility and blank.	1

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App Express Module

Field Name	Valid Values	Length
SOURCE OF CORRECTION	Valid values are A = Applicant, D = CPS, and S = School.	1
SPOUSE'S INCOME EARNED FROM WORK	Valid values are -999999 to 999999 and blank.	7
SSA CITIZENSHIP FLAG	Valid values are A = U.S. citizen, B = Legal alien, eligible to work, C = Legal alien, not eligible to work, D = Other, E = Alien, student restricted, work authorized, F = Conditionally legalized alien, N = Unable to verify citizenship due to no match on SSN, name or date of birth, * = Foreign, and Blank = Domestic born (U.S. Citizen).	1
SSN DATE OF DEATH	Valid values are 19000101 to 20021231 and blank.	8
SSN MATCH FLAG	Valid values are 1 = No match on SSN, 2 = SSN and name match, no match on DOB, 3 = SSN match, no match on name, 4 = SSN, Name, and DOB match, 5 = SSN, name, DOB match with Date of Death, and 8 = Record not sent to SSA.	1
STI: STUDENT'S TOTAL INCOME	Valid values are -9999999 to 9999999 and blank.	8
STUDENT ELIGIBLE TO FILE 1040A OR 1040EZ?	Valid values are 1 = Yes, 2 = No, 3 = Don't know, and Blank.	1
STUDENT ID	Valid values are 001010001 to 999999999 in positions 1-9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank in position 10-11, and 01 to 00 in positions 12-13.	13
STUDENT LEGAL RESIDENT BEFORE 01/01/1996?	Valid values are 1 = Yes, 2 = No, and blank.	1
STUDENT'S ADJUSTED GROSS INCOME	Valid values are -999999 to 999999 and blank.	7
STUDENT'S BUSINESS/FARM NET WORTH	Valid values are 000000 to 999999 and blank.	6
STUDENT'S CALCULATED TAX STATUS	Valid values are 1, 2, or 3 = Tax Filer, 4 or 5 = Non-Tax Filer, and Blank.	1
STUDENT'S CASH, SAVINGS, AND CHECKING	Valid values are 000000 to 999999 and blank.	6
STUDENT'S CURRENT SSN	Valid values are 001010001 to 999999999.	9

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App Express Module

Field Name	Valid Values	Length
STUDENT'S EXEMPTIONS CLAIMED	Valid values are 00-99 and blank.	2
STUDENT'S INCOME EARNED FROM WORK	Valid values are -999999 to 999999 and blank.	7
STUDENT'S INVESTMENT NET WORTH	Valid values are 000000 to 999999 and blank.	6
STUDENT'S LAST NAME/SSN CHANGE FLAG	Valid values are N = Last Name change, S = Social Security Number change, B = Social Security Number and last name change, and Blank = No change.	1
STUDENT'S MARITAL STATUS	Valid values are 1 = Unmarried (Single, Divorced, or Widowed), 2 = Married/Remarried, 3 = Separated and Blank.	1
STUDENT'S MARITAL STATUS DATE	Valid values are 190001 to 200212 and Blank.	6
STUDENT'S NUMBER IN COLLEGE	Valid values are 0 to 9 and blank.	1
STUDENT'S NUMBER OF FAMILY MEMBERS	Valid values are 00 to 99 and blank.	2
STUDENT'S STATE OF LEGAL RESIDENCE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
STUDENT'S TAX RETURN FILED?	Valid values are 1 = Completed, 2 = Will file, 3 = Will not file, and Blank.	1
STUDENT'S TOTAL FROM WORKSHEET A	Valid values are 00000 to 99999 and blank.	5
STUDENT'S TOTAL FROM WORKSHEET B	Valid values are 00000 to 99999 and blank.	5
STUDENT'S TOTAL FROM WORKSHEET C	Valid values are 00000 to 99999 and blank.	5
STUDENT'S TYPE OF TAX RETURN USED?	Valid values are 1 = 1040, 2 = 1040A,1040EZ,1040Telefile, 3 = Foreign Tax Return, 4 = Tax return from Puerto Rico, Guam, American Samoa, the Virgin Islands, Marshall Islands, the Federate States of Micronesia or Palau, and Blank.	1
STUDENT'S U.S. INCOME TAX PAID	Valid values are 00000-99999 and blank.	5
STX: STATE TAX ALLOWANCE	Valid values are -9999999 to 9999999 and blank.	8
SUBSEQUENT APPLICATION FLAG	Valid values are Y=Yes and blank.	1

Appendix E — Query Fields

App Express Module

Field Name	Valid Values	Length
SYSTEM GENERATED INDICATOR	Valid values are A = Applicant released from Drug Enforcement hold, D = Duplicate request, H = Application released from hold, I = INS Secondary confirmation, L = Duplicate request and NSLDS match data has changed, N = NSLDS post-screening, P = Prisoner Post-Screened, Z = Reprocessed, and Blank = Not a systems generated transaction.	1
TI: TOTAL INCOME	Valid values are -9999999 to 9999999 and blank.	8
TPC: TOTAL PARENT CONTRIBUTION	Valid values are 0000000 to 9999999 and blank.	7
TRANSACTION NUMBER	Valid values are 01 to 99.	2
TRANSACTION PROCESSED DATE	Valid values are 20010101 to 20021231	8
TRANSACTION RECEIPT DATE	Valid values are 20010101 to 20021231.	8
TRANSACTION SOURCE SITE CODE	Valid values are 11 = Electronic App, 21 = Electronic Renewal App, 31 = Electronic History Correction, 41 = FAFSA Express, 51,54 = MDE Lawrence, 52,53,55,56 = MDE Mt. Vernon, 61 = FAFSA on the Web, 62 = Renewal FAFSA on the Web, 63 = Corrections on the Web, 64 = FAA Corrections on the Web, 71 = CPS ADE, 72 = CPS System Generated, 73 = CPS NSLDS Post-Screening, 74 = CPS FDR and YTD, 75 = CPS Signature HC, 76 = CPS INS Secondary Confirmation, 77 = CPS Prisoner Post-Screen, and 81 = PIC.	2
TSC: TOTAL STUDENT CONTRIBUTION	Valid values are 0000000 to 9999999 and blank.	7
VA MATCH FLAG	Valid values are 1 = Veteran status confirmed, 2 = Record found on VA database but not a qualifying Veteran, 3 = Record not found on VA database, 4 = Record found on VA database but applicant on Active duty, 8 = Record not sent to VA, and Blank.	1
VETERAN OF U.S. ARMED FORCES?	Valid values are 1 = Yes, 2 = No, and blank.	1
WORKING ON A MASTER'S OR DOCTORATE IN 2001-2002?	Valid values are 1 = Yes, 2 = No, and blank.	1

Appendix E — Query Fields

Global Module

Field Name	Valid Values	Length
ACTIVE TRANSACTION	**Valid values are 01-99.**	2
ACTIVE TRANSACTION DATE	Valid values are CCYYMMDD.	8
ACTIVE TRANSACTION ID	Valid values are A-Z, .(period), ' (apostrophe), - (dash) spaces(s) and blank.	8
ADD DATE	Valid values are CCYYMMDD.	8
ADD TIME	Valid values are HHMMSS.	6
ADD USERID	Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ((Open Parenthesis),) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [(Open Bracket),] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank.	8
ALIEN REGISTRATION #	Valid values are 000000001 to 999999999 and blank.	9
CITIZENSHIP STATUS - DEMO	Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank.	1
CURRENT SSN	Valid values are 001010001 to 999999999.	9
DATE OF BIRTH - DEMO	Valid values are CCYYMMDD.	8
DATE OF BIRTH CHANGE DATE	Valid values are CCYYMMDD.	8
DEPENDENCY STATUS - DEMO	Valid values are I = Independent, D = Dependent and blank.	1

Appendix E — Query Fields

Global Module		
Field Name	Valid Values	Length
DOCUMENT STATUS	**Valid values are B = Documents still needed for both packaging and verification, C = All documents are satisfied (includes documents required for both packaging and verification), V = Documents still needed for verification, P = Documents still needed for packaging, O = Other documents needed but not required for packaging or verification, D=Documents received but still need to be reviewed, and Blank = Status Not Determined or no documents attached to record.**	1
DRIVER'S LICENSE #	Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank.	20
DRIVER'S LICENSE STATE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
FIRST NAME - DEMO	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	12
HAS CORRECTION RECORD	Valid values are Y = Yes and N = No.	1
HAS DOCUMENT TRACKING RECORD	Valid values are Y = Yes and N = No.	1
HAS FAFSA RECORD	Valid values are Y = Yes and N = No.	1
HAS LOAN RECORD	Valid values are Y = Yes and N = No.	1
HAS NOTES RECORD	Valid values are Y = Yes and N = No.	1
HAS NSLDS RECORD	Valid values are Y = Yes and N = No.	1
HAS PACKAGING RECORD	Valid values are Y = Yes and N = No.	1
HAS PELL RECORD	Valid values are Y = Yes and N = No.	1
HAS RAD RECORD	Valid values are Y = Yes and N = No.	1
HAS VERIFICATION WORKSHEET RECORD	Valid values are Y = Yes and N = No.	1
ISIR DL MPN FLAG	Valid values are A = Active, I = Inactive, C = Closed, N = No MPN on file, U = Unavailable, and blank.	1

Appendix E — Query Fields

Global Module		
Field Name	Valid Values	Length
LAST MAILED DATE	Valid values are CCYYMMDD.	8
LAST NAME - DEMO	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	16
LEGAL RESIDENCE DATE - DEMO	Valid values are 190001 to 200212 and Blank.	6
LETTER COUNT	Valid values are 0-9 and blank.	2
LOAN INTERVIEW COMPLETED	Valid values are Y = Yes and Blank = No.	1
LOCAL ADDRESS	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	35
LOCAL ADDRESS CHANGE DATE	Valid values are CCYYMMDD.	8
LOCAL CITY	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	16
LOCAL PHONE	Valid values are 0000000000 to 9999999999 and blank.	10
LOCAL STATE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
LOCAL ZIP CODE	Valid values are 000000000 to 999999999 and blank.	9
MIDDLE INITIAL - DEMO	Valid values are A-Z and blank.	1
NAME ID	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	2
ORIGINAL SSN - DEMO	Valid values are 001-01-0001 to 999-99-9999.	9
PELL VERIFICATION STATUS	Valid values are N = Not Selected, A = Accurate, W = Without documentation, T = Tolerance, C = Calculated, R = Reprocessed and S = Selected.	1

Appendix E — Query Fields

	Global Module	
Field Name	Valid Values	Length
PERMANENT ADDRESS - DEMO	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	35
PERMANENT ADDRESS CHANGE DATE	Valid values are CCYYMMDD.	8
PERMANENT CITY - DEMO	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	16
PERMANENT PHONE NUMBER - DEMO	Valid values are 0000000000 to 9999999999 and blank.	10
PERMANENT STATE - DEMO	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
PERMANENT ZIP CODE - DEMO	Valid values are 000000000 to 999999999 and blank.	9
PREVIOUS TRANSACTION	Valid values are 01-99.	2
RECORD SOURCE	Valid values are M = Manual Entry, I = ISIR Import, P = Packaging External Import Add, L = Direct Loan External Import Add, E = Pell Import External Add, Y = Prior Year Demographic Import, and blank.	1
SCHOOL USE	Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ((Open Parenthesis),) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [(Open Bracket),] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank.	20
SSN CHANGE DATE	Valid values are CCYYMMDD.	8
STATE OF LEGAL RESIDENCE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
TRANS PAID ON	Valid values are 01-99	2
TRANSACTION #	Valid values are 00-99.	2
UPDATE DATE	Valid values are CCYYMMDD.	8

Global Module		
Field Name	Valid Values	Length
UPDATE ID	Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ((Open Parenthesis),) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [(Open Bracket),] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank.	8
UPDATE TIME	Valid values are HHMMSS.	6

Packaging Module

Field Name	Valid Values	Length
ACADEMIC YEAR PROFILE	**Valid values are A-Z and 0-9.**	4
ACTIVE TRANSACTION	Valid values are 01-99.	2
ACTIVE TRANSACTION DATE	Valid values are CCYYMMDD.	8
ACTIVE TRANSACTION ID	Valid values are A-Z, . (period), ' (apostrophe), - (dash) spaces(s) and blank.	8
ADD DATE	Valid values are CCYYMMDD.	8
ADD TIME	Valid values are HHMMSS.	6
ADD USERID	Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ((Open Parenthesis),) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [(Open Bracket),] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank.	8
AGGREGATE PERKINS LOAN AMOUNT	Valid values are 000000 to 999999.	6
AGGREGATE SUBSIDIZED LOAN AMOUNT	Valid values are 000000 to 999999.	6
AGGREGATE UNSUBSIDIZED LOAN AMOUNT	Valid values are 000000 to 999999.	6
ALIEN REGISTRATION #	Valid values are 000000001 to 999999999 and blank.	9
AMOUNT OF PELL	Valid values are 00000-99999.	5
APPLICATION RECEIPT DATE	Valid values are CCYYMMDD.	8
AUTO ZERO EFC	Valid values are Y=Yes and blank.	1
AWARD LETTER	Valid values are TRUE=Yes and FALSE=No.	1
AWARD LETTER MAILED DATE	Valid values are CCYYMMDD.	8
AWARD LETTER RECEIVED DATE	Valid values are CCYYMMDD.	8
AWARD LETTER SENT COUNT	Valid values are 01-99 and blank.	2
BORROWER BASED	Valid values are TRUE=Yes and FALSE=No.	1

Appendix E — Query Fields

Packaging Module		
Field Name	Valid Values	Length
BUDGET AMOUNT	**Valid values are 000000-999999.**	6
BUDGET CODE	Valid values are A-Z, 0-9, +(plus sign), -(dash), *(asterisk), #(number sign), .(period), and space.	4
BUDGET TITLE	Valid values are any valid keyboard character.	50
CITIZENSHIP STATUS - DEMO	Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank.	1
CURRENT SSN	Valid values are 001010001 to 999999999.	9
DATE OF BIRTH - DEMO	Valid values are CCYYMMDD.	8
DATE OF BIRTH CHANGE DATE	Valid values are CCYYMMDD.	8
DATE READY FOR PACKAGING	Valid values are CCYYMMDD.	8
DEFAULT STATUS	Valid Values are Y=Yes, N=No, Z=Override, and blank.	1
DEGREE	Valid values are TRUE=Yes and FALSE=No.	1
DEPENDENCY STATUS - DEMO	Valid values are I = Independent, D = Dependent and blank.	1
DIRECT LOAN PLUS	Valid values are TRUE=Yes and FALSE=No.	1
DIRECT LOAN SUBSIDIZED	Valid values are TRUE=Yes and FALSE=No.	1
DIRECT LOAN UNSUBSIDIZED	Valid values are TRUE=Yes and FALSE=No.	1
DOCUMENT STATUS	Valid values are B = Documents still needed for both packaging and verification, C = All documents are satisfied (includes documents required for both packaging and verification), V = Documents still needed for verification, P = Documents still needed for packaging, O = Other documents needed but not required for packaging or verification, D=Documents received but still need to be reviewed, and Blank = Status Not Determined or no documents attached to record.	1
DRIVER'S LICENSE #	Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank.	20

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Packaging Module		
Field Name	Valid Values	Length
DRIVER'S LICENSE STATE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
EFC - PACKAGING	Valid values are 00000 - 99999.	5
ENROLLMENT STATUS - PACKAGING	Valid values are FULL TIME, 3/4 TIME, 1/2 TIME, < 1/2 TIME, and NOT ENROLLED.	15
ESTIMATED PELL GRANT	Valid values are 00000-99999.	5
EXPORT TO EXTERNAL SYSTEM	Valid values are TRUE=Yes and FALSE=No.	1
FIRST NAME - DEMO	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	12
FUND AID TYPE	Valid values E = Supplemental Educational Opportunity Grant (SEOG), F = Federal Pell Grant, G = Grant, R = Grant, Non-need Based, K = Federal Perkins Loan, N = Non-Need Based Loan (NNB), L = Other Need Based Loan (NB), S = Direct Subsidized Loan (Sub), U = Direct Unsubsidized (Unsub Non-need Based), D = Direct Unsubsidized Loan (Unsub, Need Based), P = Federal Parent Loan for Undergraduate Students (PLUS), O = Outside Resources, V = Chapter 30 VA Benefits/Americorps, W = Federal Work-Study (FWS), and Y = Other Work-Study.	1
FUND CALCULATED VALUE	Valid values are 00000-99999.	5
FUND CODE	Valid values are A-Z, 0-9, +(plus sign), -(dash), *(asterisk), #(number sign), .(period), and blank (spaces).	8
FUND CURRENT TOTAL	Valid values are 00000-99999.	5
FUND DECISION TO ACCEPT	Valid values are A=Accept, D=Decline, O = Offered and S=Suspend.	1
FUND PREVIOUS TOTAL	Valid values are 00000-99999.	5

Appendix E — Query Fields

Packaging Module		
Field Name	Valid Values	Length
GRADE LEVEL IN COLLEGE - PACKAGING	**Valid values are 0 = 1st year, never attended** college, 1 = 1st year, attended college before, 2 = 2nd year/sophomore, 3 = 3rd year/junior, 4 = 4th year/senior, 5 = 5th year/other undergraduate, 6 = 1st year graduate/professional, 7 = Continuing graduate/professional, and Blank.	1
HAS CORRECTION RECORD	Valid values are Y = Yes and N = No.	1
HAS DOCUMENT TRACKING RECORD	Valid values are Y = Yes and N = No.	1
HAS FAFSA RECORD	Valid values are Y = Yes and N = No.	1
HAS LOAN RECORD	Valid values are Y = Yes and N = No.	1
HAS NOTES RECORD	Valid values are Y = Yes and N = No.	1
HAS NSLDS RECORD	Valid values are Y = Yes and N = No.	1
HAS PACKAGING RECORD	Valid values are Y = Yes and N = No.	1
HAS PELL RECORD	Valid values are Y = Yes and N = No.	1
HAS RAD RECORD	Valid values are Y = Yes and N = No.	1
HAS VERIFICATION WORKSHEET RECORD	Valid values are Y = Yes and N = No.	1
HOUSING PLANS	Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank.	1
INTERESTED IN EMPLOYMENT	Valid values are Y=Yes and N=No.	1
INTERESTED IN STUDENT LOANS	Valid values are Y=Yes and N=No.	1
ISIR DL MPN FLAG	Valid values are A = Active, I = Inactive, C = Closed, N = No MPN on file, U = Unavailable, and blank.	1
LAST MAILED DATE	Valid values are CCYYMMDD.	8
LAST NAME - DEMO	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	16

Appendix E — Query Fields

Packaging Module Field Name	Valid Values	Length
LEGAL RESIDENCE DATE - DEMO	Valid values are 190001 to 200212 and Blank.	6
LETTER COUNT	Valid values are 0-9 and blank.	2
LOAN INTERVIEW COMPLETED	Valid values are Y = Yes and Blank = No.	1
LOCAL ADDRESS	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	35
LOCAL ADDRESS CHANGE DATE	Valid values are CCYYMMDD.	8
LOCAL CITY	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	16
LOCAL PHONE	Valid values are 0000000000 to 9999999999 and blank.	10
LOCAL STATE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
LOCAL ZIP CODE	Valid values are 000000000 to 999999999 and blank.	9
LOW TUITION	Valid values are 1 = 0 dollars, 2 = 1 to 106 dollars, 3 = 107 to 212 dollars.	1
METHODOLOGY CODE	Valid values are A-Z and 0-9.	4
MIDDLE INITIAL - DEMO	Valid values are A-Z and blank.	1
NAME ID	Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank.	2
ORIGINAL SSN	Valid values are 001010001 to 999999999.	9
ORIGINAL SSN - DEMO	Valid values are 001-01-0001 to 999-99-9999.	9
OVERAWARD INDICATOR	Valid values are Y = Overaward exists, N= No, Overaward exists, E = Exception, R = Resolved, or blank	1
PACKAGED DATE	Valid values are CCYYMMDD.	8

Packaging Module		
Field Name	Valid Values	Length
PACKAGING ADD DATE	Valid values are CCYYMMDD.	8
PACKAGING RECORD SOURCE	Valid values are E=External Import, M=Manual Record and I=ISIR Import.	1
PACKAGING RESULTS	Valid values are A = Any part of the Packaging Results accepted, D = Package Totally Declined, O = Offered, S = Suspend, and blank	1
PACKAGING STATUS	Valid values are P = Packaged, R = Ready to Package, M = Manually Adjusted Package, N = Not Ready to Package, U = Unpackaged and H = Handpackaged.	1
PARENT CONTRIBUTION	Valid values are 00000-99999.	5
PELL EFC	Valid values are 00000-99999.	5
PELL ELIGIBLE FLAG	Valid values are TRUE = Yes and FALSE = No.	1
PELL VERIFICATION STATUS	Valid values are N = Not Selected, A = Accurate, W = Without documentation, T = Tolerance, C = Calculated, R = Reprocessed and S = Selected.	1
PERMANENT ADDRESS - DEMO	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	35
PERMANENT ADDRESS CHANGE DATE	Valid values are CCYYMMDD.	8
PERMANENT CITY - DEMO	Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank.	16
PERMANENT PHONE NUMBER - DEMO	Valid values are 0000000000 to 9999999999 and blank.	10
PERMANENT STATE - DEMO	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
PERMANENT ZIP CODE - DEMO	Valid values are 000000000 to 999999999 and blank.	9
PREVIOUS TRANSACTION	Valid values are 01-99.	2
PRINT LETTER IN NEXT BATCH?	Valid values are TRUE=Yes and FALSE=No.	1

Appendix E — Query Fields

Packaging Module

Field Name	Valid Values	Length
PROCESS DATE	Valid values are CCYYMMDD.	8
RECORD SOURCE	Valid values are M = Manual Entry, I = ISIR Import, P = Packaging External Import Add, L = Direct Loan External Import Add, E = Pell Import External Add, Y = Prior Year Demographic Import, and blank.	1
REMAINING NEED	Valid values are -999999 to 999999.	6
SATISFACTORY ACADEMIC PROGRESS	Valid values are A-Z, 0-9, +(plus sign), -(dash), *(asterisk), #(number sign), .(period), %(percent), <(less than), and >(greater than).	2
SCHOOL USE	Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ((Open Parenthesis),) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [(Open Bracket),] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank.	20
SIMPLIFIED NEEDS	Valid values are TRUE=Yes and FALSE=No.	1
SSN CHANGE DATE	Valid values are CCYYMMDD.	8
STATE OF LEGAL RESIDENCE	Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference.	2
TERM DESCRIPTION	Valid values are A-Z, 0-9, +, -, *, #, ., ', and spaces.	8
TERM NUMBER	Valid values are 1 = 1st Term, 2 = 2nd Term, 3 = 3rd Term, 4 = 4th Term, 5 = 5th Term.	1
TOTAL INCOME	Valid values are -9999999 to 9999999.	8
TRANS PAID ON	Valid values are 01-99	2
TRANSACTION #	Valid values are 00-99.	2
UNMET NEED AMOUNT	Valid values are -999999 to 999999.	6
UPDATE DATE	Valid values are CCYYMMDD.	8

Appendix E — Query Fields

Packaging Module		
Field Name	Valid Values	Length
UPDATE ID	Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ((Open Parenthesis),) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [(Open Bracket),] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank.	8
UPDATE TIME	Valid values are HHMMSS.	6
USER DEFINED FORMULA 1	Valid values are 00000000 to 99999999.	8
USER DEFINED FORMULA 2	Valid values are 00000000 to 99999999.	8
USER DEFINED FORMULA 3	Valid values are 00000000 to 99999999.	8
USER DEFINED FORMULA 4	Valid values are 00000000 to 99999999.	8
VERIFICATION TYPE	Valid values	2